



# IRIS GP Payroll

## Manual

10/02/2014



## Useful contact information


### IRIS GP Payroll support

 0844 815 5681

 0844 815 5665


 support@gppayroll.co.uk

### HMRC online service helpdesk

 0300 200 3600

 helpdesk@ir-efile.gov.uk

### HMRC employer helpline

 0300 200 3200

### HMRC new employer helpline (for new businesses)

 0300 200 3211

# IRIS GP Payroll Manual

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## Where to find help

### Help facilities

IRIS GP Payroll has an extensive online help facility. Click the **HELP** button or press the <F1> key to produce a help screen.

Telephone support for IRIS GP Payroll is designed to help with problems specific to the software. We assume that you have knowledge of PAYE and the NHS pension scheme.

### IRIS GP Payroll support

**0844 815 5681**

**0844 815 5665**

**support@gppayroll.co.uk**



## Backing up your data

The most important process in any payroll system is the production of backups. Computers are vulnerable to fire, flood, theft, hardware failure and many other unforeseen hazards. Having an up-to-date backup is essential should any of these situations occur.

It is important to take some form of backup on the completion of all work every month. As well as **producing** the backup you must be confident that you can **use** this backup to restore your payroll if you need to.

We still recommend that you create your backups on removable media (e.g. floppy discs, CDs or memory sticks). It is possible to save backups to other hard disks on the practice network but it is our experience that operators cannot easily restore these backups without the help of IT experts. If the payroll software and data have to be loaded onto another PC it is often very difficult for inexperienced operators to find the backup files when they are placed on other hard disks in the practice network.

**Do not rely on the regular tape backup of the practice server which may be produced automatically every night.** IT advisers may suggest that this is the safest method of backing up your data but we have found that it is often impossible to extract the payroll data from these tapes. To recover lost payroll data you may have to restore the whole tape which would also restore the patient clinical data to the point when the backup tape was made. This can lead to recently entered patient data being lost which would be unacceptable.

Keep the payroll backup process simple and separate from any general server backup by using a removable medium. **There should be at least three backups.** If you are using floppy discs or memory sticks the three discs/sticks can be used in rotation. If you are using CDs you will produce a new CD on each backup, which means you will collect twelve backups over the year. At least the last three backup CDs should be retained.

## Backing up to CD

IRIS GP Payroll can produce a backup onto a CD. The advantage of using a CD rather than floppies is that more data can be stored. The **Backup to a CD** facility will store all information about previous years' payrolls as well as the latest data on the current payroll. If the payroll has to be re-established on a new machine then restoring from a CD will restore all previous payrolls as well as the current system. Floppies can only hold payroll data for one year and it is therefore a more complex operation to load previous years' payrolls when setting up IRIS GP Payroll on a new machine.

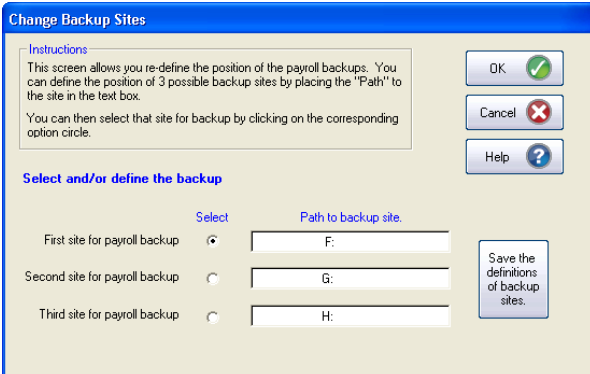
The CD must be a single-write CD (a CD-R) which means that you will need a new CD for every backup that is produced. CD-Rs can now be purchased very cheaply. Multiple write CDs (CD-RW) have been found to be unreliable and IRIS GP Payroll does not support backing up onto multiple write CD-RWs.

Click the **Backup Restore** button of the Main Option screen. Select **Backup to a CD**, click **OK** and choose the CD drive from the drop-down menu on the next screen (normally there will only be one CD writer available). IRIS GP Payroll will ask for a new CD to be loaded and then produce the CD backup. You will find that CD backups may take a little longer than floppy backups because more information is stored on the CD backup.

You will soon have a large collection of payroll backup CDs because a new backup CD will be produced every month. It is important to have a good system of marking and storing the CDs. The ideal system will retain all twelve backup CDs until the end of the tax year but at least the last three CDs should be retained. On moving to the new tax year all but the last CD can be discarded; the last CD should be retained as the final backup of the year's data.

## Backing up to other sites

It is still possible to define other backup sites such as memory stick drives, zip drives or other hard drives on the practice network. Click the **Backup Restore** button of the Main Option screen. Select **Backup to another site** and click **OK**.



Select the site you want to use. If you haven't defined the site already, enter the drive letter or the exact path of the backup directory. Click **OK** to create the backup. IRIS GP Payroll will save the definitions of the backup sites.

## Restoring payroll data

Click the **Backup Restore** button of the Main Option screen and select **Restore Data**. The options on the screen will change to: **Restore from a floppy disc**; **Restore from a CD** and **Restore from another site**.

If you choose **Restore from a CD**, IRIS GP Payroll will restore all current payroll data and all previous years' payrolls (which were loaded on the original system when the backup CD was taken). Only the current year's payroll data will be restored if you choose to **Restore from a floppy disc** or **Restore from another site**.

## Restoring previous years' payrolls

IRIS GP Payroll creates a copy of the old year's payroll when it converts to a new tax year. Normally, these old payrolls can be accessed from the Setup Options tab **15 - Previous years' payrolls**. However, you will need to restore the previous year's data before you can access it if it is not already on the PC (perhaps because the payroll had to be re-established on a new machine).

To restore a previous year's payroll data you will need the latest IRIS GP Payroll upgrade CD and the backup (e.g. CD or floppy disc) taken at the end of the tax year that you want to restore. Click the **Setup/ Options** button of the Main Option screen, click the tab **15 - Previous years' payrolls** and select the year you want to restore. Follow the instructions on the screen.

## Overview of IRIS GP Payroll operation

### Evaluation Period

If you have not purchased a licence for IRIS GP Payroll you can use the software for a limited period only. You can run up to four payrolls but after this point you will be asked to purchase a licence before you can proceed. When you purchase a licence you will receive an email or letter containing your **Contract Number**, **Practice Name** and **Licence Key**. Click on '**Setup/Options**' and select the tab '**16 - Licence**'. Enter the details from your email or letter and click '**Update Licence**'. The **Expiry Date** is displayed. Click '**OK**'.

### Select Tax Year

This option is to allow you to select the Payroll Year in use for the practice when you first use the system. Once configured the practice's Payroll Year will be maintained automatically.

When you login for the first time a screen will be displayed allowing you to select the Payroll Year. The Payroll Year will have two options:

- the latest tax year available
- the previous payroll year

The default payroll year displayed will depend upon your computer's system date. See example below:-

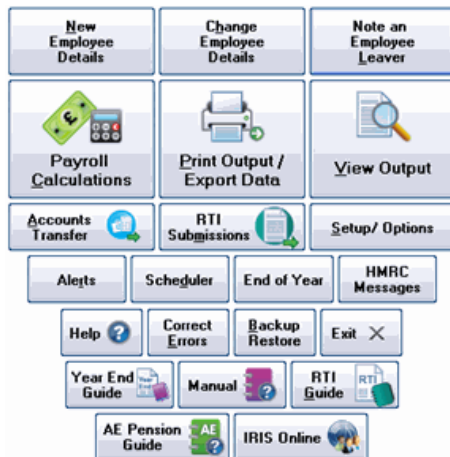
Computer's System Date	Suggested Tax Year
05/04/2014	2013/2014
06/04/2014	2014/2015

The system will allow you to change the payroll year by clicking on the drop down box and selecting the year required. This is useful if your computer's system date is incorrect, for example.

## Using IRIS GP Payroll

When you run IRIS GP Payroll, the first screen you see is the **Payroll password** screen. You can enter either the Payroll Operator Password or the Practice Manager (Master) Password.

The Practice Manager (Master) Password will give you access to everything in IRIS GP Payroll; the Payroll Operator Password gives restricted access. Both passwords are set to **pass** at installation (four un-shifted letters followed by RETURN). For details of how to change either of these passwords see the section **IRIS GP Payroll set up options**.



The next screen you will see is the **Main Option screen** which is designed to give easy access to the main functions of IRIS GP Payroll.

The appearance of the Main Option screen buttons can be changed using the Setup/ Options tab **13 - Screen Appearance**.

Employee records are created and adjusted using the three buttons on the top line.

### New Employee Details

The first button is used to add new employees (see the section **Adding or changing employee details**).

### Change Employee Details

Use the second button to record changes in rates of pay, tax codes etc. (see the section **Change employee details**).

### Note an Employee Leaver

The third button is used to enter an employee's leaving date. When a leaving date has been added to an employee record, that employee will no longer be included in payroll calculations but information on the employee will be retained for end-of-year submissions (see the section **When an employee leaves**).

**The large buttons in the middle row are used to calculate monthly payrolls and print or view the results.**

### Payroll Calculations

The Payroll Calculations button is used every month to calculate pay for all members of staff (see

the section **Paying the employees**). You can pay a standard amount every month or enter temporary figures (e.g. overtime) for each employee, which will apply for only one month.

### Print Output/Export Data

The Print Output/ Export Data button gives you access to all the printed output available from IRIS GP Payroll. You will use this button after the monthly payroll calculation to print employee payslips, a summary of the payroll calculations and any other reports or documents you need. You can also export data for use by other programs (e.g. Microsoft Excel or electronic banking software).

### View Output

If you want to view a report without printing it, you can use the View Output button to show various reports on the screen.

### The remaining buttons on the lower lines give access to special functions of IRIS GP Payroll.

The **Accounts Transfer** button will transfer a monthly payroll directly to the expenditure ledger of IRIS GP Accounts.

The **End-of-Year** button is used to produce all PAYE and pension summaries at the end of the tax year.

The **HMRC Messages** button will access the HMRC message service (DPS service).

The **Contract Alerts** button sets Practice Alerts and Employee Alerts (see the section **Contract alerts**).

The **Scheduler** button opens the scheduler screens to monitor employee holidays and training days (see **The Holiday Scheduler** section).

The **Setup/ Options** button allows you to adjust the operation of IRIS GP Payroll to suit your own practice.

The **Correct Errors** button allows you to remove any calculations that were performed in error.

The **Year End Guide** button gives you access to the online year end guide document.

The **Manual** button gives you access to the online version of this manual.

## IRIS GP Payroll set up options

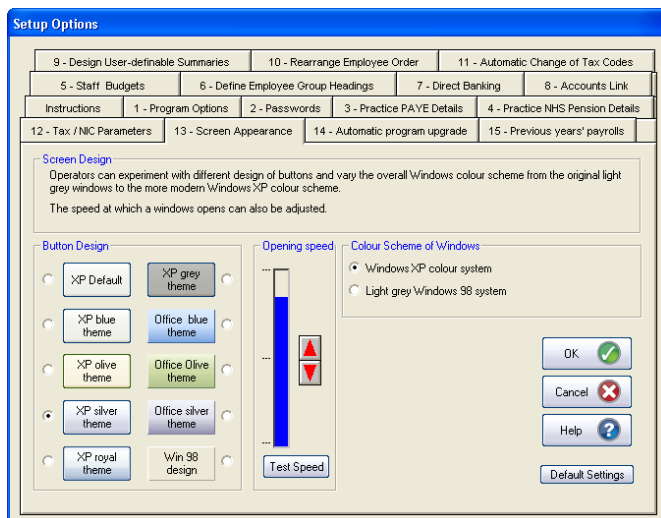
There are various settings within IRIS GP Payroll which define the operation of the software. Click the **Setup/ Options** button on the Main Option screen to view the Setup Options screen.

The first time you use IRIS GP Payroll there are several settings which you need to check and possibly change:

- **The NHS Pension Agency** - Go to the Setup/Options tab **3 Practice PAYE Details** and choose your local pension agency from the options - England/Wales, Scotland or Northern Ireland. This selection defines the employer contribution rate and sets the layout of many pension print-outs.
- **Small Employers' Relief on SMP** - If the employee and employer NI contributions in 2013/14 were below £45000 the practice can claim this relief. Go to the Setup/ Options tab **1 Program Options** and choose the appropriate option. The relief ensures a higher reimbursement of any SMP payments.
- **Appearance of Printed Output** - The **Design of Printed Output** section of the Setup/ Options tab **1 Program Options** allows adjustments to the appearance of payslips and printed summaries. Practices with a good colour printer can produce payslips and summaries in colour. Clicking the **Design of Payslip** button will open a screen containing more options for the content and layout of payslips (see the section **Plain paper payslip design**).
- **Passwords** - IRIS GP Payroll has two passwords - the Payroll Operator Password will give you access to all payroll and Scheduler functions but not to confidential employee details; the Practice Manager (Master) Password will give you full access. The passwords can be identical if only one person uses the software. To amend one or both passwords, click the **Setup/Options** button on the main screen then select tab **2 - Passwords**. If you forget the password or for any reason you cannot enter the software you should contact support.
- **HMRC details** - You need to enter various reference numbers, passwords and User Identification Details into the Setup/ Options tab **3 Practice PAYE Details** to allow IRIS GP Payroll to communicate with HMRC (see the section **Electronic links to HMRC**).
- **Tax/NIC Parameters** - The Setup/ Options tab **12 Tax/ NIC Parameters** contains the tax and NIC figures which are used in monthly payroll calculations. The parameters can be examined and a summary printed but normally these figures should **not** be changed. If new parameters are issued by HMRC an upgraded version of IRIS GP Payroll will be issued which will change the parameters automatically.
- Many of the other tabs in the Setup/ Options screen will be referred to in later chapters when staff budgets, employee group headings, direct banking, the accounts link and user-definable summaries are described.

## Screen appearance

Setup/ Options tab **13 Screen Appearance** gives you the option to re-design the appearance of IRIS GP payroll to your own preference.



In the Colour Scheme section you can select a Microsoft Windows XP or Microsoft Windows 98 appearance.

In the Button Design section you can select a button design.

Click **OK** to apply your changes.

## Previous years' Payrolls

A copy of the 2013-2014 payroll was retained when you converted to the 2014-2015 version. You can enter the old payroll using Setup/Options tab **15 Previous year's payrolls**.

If the 2013-2014 data is not available for some reason (e.g. because machines have been changed) it will have to be loaded from the latest IRIS GP Payroll CD and the data backup taken at the end of the 2013-2014 tax year.

Follow the instructions on the screen to load IRIS GP Payroll from the latest update CD and insert the data backup when requested.

The same method can be used to load the data for any of the previous years available on this tab. IRIS GP Payroll keeps data from the last nine tax years.



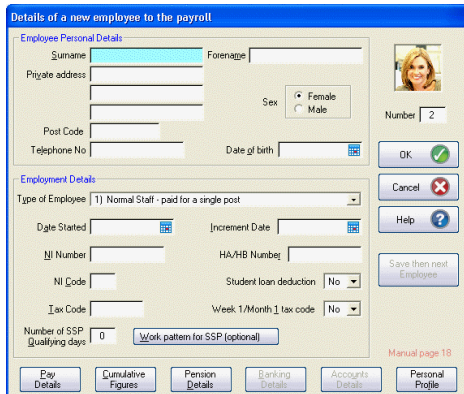
## Adding or changing employee details

### Introduction

To enter an employee's details click the option **New Employee Details** in the Main Option screen, this takes you into the main employee details screen. There are three main steps which apply to all employees - the main employee details are entered, then salary details are added and finally cumulative or year-to-date figures are added. As well as these essential steps, there are a number of optional sections including pension, banking details, accounts transfer details and other personal details. These more specialised details are dealt with in a separate chapter (see the section **Extra employee details**).

### Main employee details

When you click the **Add an employee** button the main employee details window appears.



The essential fields are the employee's name, the NI code and the tax code. Other fields should be completed when the information becomes available. At the end-of-year the employee's data **MUST** have an NI number or a date of birth to be accepted by HMRC.

### Tax code

Enter the employee's tax code which usually consists of some numbers and a letter (e.g. 603L).

There are several special tax codes:

- The basic rate code is entered as BR
- The first digit of the 0T code is the zero character, not the letter O
- The code NT will be accepted and signifies that no income tax is to be deducted
- Any K codes are entered with a leading K, for example K543

### Week/Month 1

If HMRC instruct you to use a Week 1/Month 1 tax code use the drop-down menu to the right of the tax code field and select **Yes**.

## NI code

Codes A, B, C, D, E, J and L will be accepted and will have their usual meaning, defined in the HMRC publication 'Employer's Help Book - Day to day payroll. (E13)'. The employee NI code is NOT the last letter of their National Insurance number. Employees in general practice should be given the standard A code unless:

- They hold a valid certificate of election (CF383/CF380A) and can have the contribution code B
- They are over state pension age and hold a certificate of age exemption (CF384), when they can be given a C code
- They have joined the NHS pension scheme. Employees in the pension scheme should have a D code, unless they have a certificate of election when they can have an E code. Employees who are in the pension scheme and are over the state pension age are given the normal C code

## Increment date

This is the date of the employee's next pay increment. This is an optional field which can be left blank. If you start to run a payroll in a month when an employee was due to have an increment you will be warned that the increment has not been applied.

## SSP qualifying days

This is the number of days (including part-days) per week when the employee is available for work. It is important that the entry is correct or subsequent SSP calculations will be wrong. If you intend to use the SSP diary to record employee absences you must enter the actual days that the employee is expected to be at work (see the section **Statutory sick pay**).

## Student loans

You will be informed if an employee is to have student loan deductions taken from his/her monthly payments. You can receive a Start Notice (form SL1) from HMRC or a new employee may hand you a P45 which has a **Y** in the Student Loan box. (This means that a Start Notice has been issued to a previous employer). Use the drop-down menu to select '**Yes**' for a student loan. IRIS GP Payroll will calculate and deduct the loan automatically.

## Type of employee

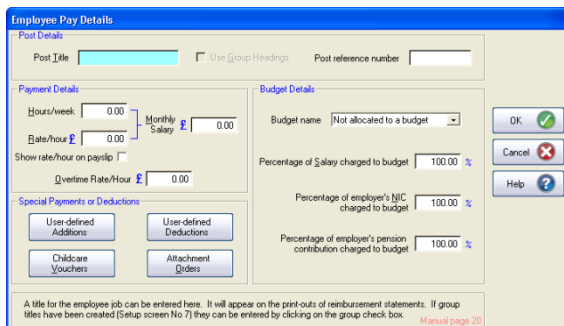
IRIS GP Payroll recognises seven types of employee:

1. A member of staff with a single post (the most common setting).
2. A member of staff who is paid for more than one post. This can mean two or more separate types of employment (e.g. receptionist and phlebotomist) or posts which are set against two or more budgets.
3. A relief member of staff. Relief staff are not allocated a normal monthly salary and will not appear on a payrun unless they are given a temporary adjustment in a month.
4. A practice trainee/registrar.
5. Categories 5 (practice is pension provider) and 6 (HA is pension provider) can be used for employed doctors. Category 5 was used prior to the New Contract when practices were responsible for sending the doctor's pension contributions directly to the Pension Agency. It is retained because some Scottish practices continue to manage the doctor's pension - all other practices should use category 6. For more details about doctors' pension management (see the section **Entering salary details** below).
6. Category 6 is the normal category for employed doctors because local PCTs are now managing the pension contributions of employed doctors.
7. A doctor who is a partner in the practice. Doctors in this category can be paid a monthly drawings figure which can be varied each month. There will be no tax, NI or pension deductions because these deductions are calculated on the partner's annual profits.

## Entering salary details

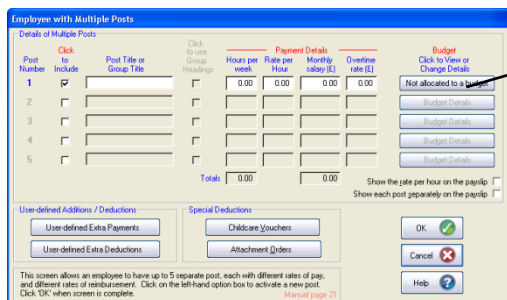
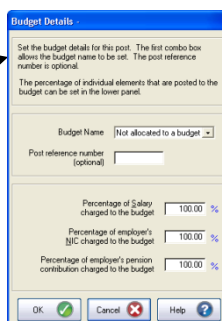
When you click the **Pay Details** button the screen that appears depends on the Type of Employee chosen:

### Staff with one post (Type of Employee = 1)



The screenshot shows the 'Employee Pay Details' window. It has a 'Post Details' section at the top with a 'Post title' field and a 'Post reference number' field. Below this is the 'Payment Details' section, which includes 'Hours/week' (0.00), 'Rate/hour' (£ 0.00), 'Monthly Salary' (£ 0.00), and 'Overtime Rate/Hour' (£ 0.00). There is also a 'Show rate/hour on payslip' checkbox. To the right of the 'Payment Details' is the 'Budget Details' section, which includes a 'Budget name' dropdown (set to 'Not allocated to a budget'), and three percentage fields: 'Percentage of Salary charged to budget' (100.00 %), 'Percentage of employer's NIC charged to budget' (100.00 %), and 'Percentage of employer's pension contribution charged to budget' (100.00 %). At the bottom left, there are buttons for 'User-defined Additions', 'User-defined Deductions', 'Childcare Vouchers', and 'Attachment Orders'. At the bottom right, there are 'OK', 'Cancel', and 'Help' buttons. A small note at the bottom states: 'A title for the employee job can be entered here. It will appear on the print-outs of reimbursement statements. If group titles have been created (Setup screen No 7) they can be entered by clicking on the group check box. Manual page 20.'

## Staff paid for more than one post (Type of Employee = 2)

Budget details are on a separate screen.

## Payment details

The three fields for weekly hours, hourly rate and monthly salary are interrelated. Entering any two will set the third. The salary is calculated using the formula, monthly salary = (weekly hours x hourly rate) / 7 x 365 / 12. Some practices (or Health Authorities) may use a different formula to calculate the monthly salary and if this is the case the true monthly salary should be entered in the monthly salary box.

## Childcare vouchers

Clicking this button will open a screen which allows you to specify the value of the deduction for childcare vouchers. The amount you enter will be deducted from the employee; however the employee will save on tax and NIC up to a maximum exempt value. From 6th April 2011 the maximum exempt value for an employee joining the childcare voucher scheme depends on the whether the employee's earnings are liable to tax at the basic, higher or additional rate:

	Basic Rate 20% (£)	Higher Rate 40% (£)	Additional Rate 50% (£)
Maximum monthly exempt value	243	124	97

Any employees already in a childcare voucher scheme by 5th April 2011 will not be affected and are entitled to the maximum exempt amount, i.e. £243.

IRIS GP Payroll will deduct the amount you entered from the employee, show this deduction on the payslip and make tax and NIC adjustments. There is more information on child vouchers on the HELP screens.

Childcare vouchers can only be supplied to employees under certain conditions. For details of conditions go to [www.hmrc.gov.uk/payee/exb/a-z/c/childcare.htm](http://www.hmrc.gov.uk/payee/exb/a-z/c/childcare.htm).

## Attachment orders

When you click this button the Attachments screen will be displayed, allowing you to enter up to three attachments of earnings orders. Click the **Add** button to enter details on child support, community charge, council tax, attachment of earnings and earnings arrestments (Scotland). The details of each order will be supplied to the practice by the court. The HELP screen gives detailed instructions for each order. There is an option to include the employer's fee. This optional £1 admin fee will be deducted from the employee's pay and retained by the practice for administrative costs.

## Budget setting

This drop-down menu (employee type 1) or button (type 2) allows payments to the employee to be charged to any one of ten budgets. For more information on budgets and budget settings (see the section **Staff budgets**).

## User-defined Additions and Deductions

IRIS GP Payroll will accept up to three user-defined additions and up to three user-defined deductions. Clicking the addition or deduction buttons will display a screen that allows you to define the additions/deductions; you can specify the amount, some text to describe it on the payslip, and there are options to include before tax, NIC and/or pension calculations.

## Post title

A post title (e.g. receptionist or practice manager) is not necessary when the employee has one post (Type of Employee = 1) but it is essential for employees with multiple posts to distinguish the various posts in budget analysis.

## Relief staff (Type of Employee = 3)

No regular salary is assigned to Relief staff. They only receive payment when a temporary adjustment of salary or overtime or relief payment is allocated in a particular month. In these circumstances a charge to a budget will be made in the usual way and therefore information on post title, budget, reimbursement percentages etc. should be entered.

## Registrars (Type of Employee = 4)

IRIS GP Payroll is designed to accept the information supplied by the Health Authority. The practice will be informed of the registrar's annual salary (which includes an allowance for out-of-hours commitments) and the registrar's monthly superannuation payment. The Health Authority (or Deanery) is responsible for sending the registrar's pension contributions to the Pension Agency every month and (from April 2008) will set the employee's contribution percentage. The monthly superannuation should include any additional amount for purchase of added years. The Car Allowance can be set to zero if it is no longer paid as a fixed monthly amount. Registrars are not allocated to any of the ten budgets because their costs are still reimbursed by the Health Authority.

### Salaried Doctors, Assistants or Retainers (Type of Employee = 6)

There are two categories (5 and 6) for salaried doctors. Category 6 should be used for all salaried doctors (including assistants, retainers, retainees and flexible scheme doctors). Category 5 should not normally be used because it was designed for the pre-contract situation when the practice was responsible for sending the doctor's pension contribution to the Pension Agency.

PCTs or Health Authorities have taken over the responsibility of sending the employee and employer contributions to the Pension Agency for all doctors since the introduction of the New Contract. The PCT/HA handle all joiner/leaver and end-of-year forms and make the decision about the employee's percentage contribution rate (from April 2008). The practice's responsibility is limited to withholding the doctor's own contribution (this has to be done through the payroll because there is a tax allowance). This contribution is not sent to the Pension Agency. It is recovered by the PCT/HA, usually by a reduction in a later global sum payment.

The Pay Details screen for a doctor entered as a category 6 employee requests the doctor's monthly salary and the doctor's monthly pension contribution. The contribution should be the same amount as is sent by the PCT/HA to the Pension Agency. Enter this amount if the practice is notified by the PCT/HA. If there is no notification, enter 6.5% of the salary figure (or a higher percentage if that applies, or the doctor is buying extra years.)

The salary figure and the monthly pension contribution can be varied in the Temporary Adjustment screen if the doctor is paid irregular amounts each month.

### Doctors / Partners in the practice (Type of Employee = 7)

The Pay Details screen for partners will accept a figure for monthly drawings. This can be adjusted in the Temporary Adjustment screen each month.

If a practice does not want to pay partners each month but wishes to use the Holiday Scheduler or personal profile facilities then a zero monthly drawings figure should be entered. In that case no payment calculations will be made, no payslip will be produced and the partner's name will not appear on the monthly summary.

### Entering cumulative/year-to-date figures

A wizard has been added to simplify the process of entering cumulative (or year-to-date) figures. On each wizard screen you will make certain entries and this will define the other screens which will be presented. You can step back and forward through the wizard screens using the **Next** and **Back** buttons. The wizard screen should be self explanatory and each screen has a Help button to explain the choices on that screen.

New employees with or without a P45 - The normal selection on the first wizard screen will be for a new employee to the practice who may or may not arrive with a P45.

The wizard will lead you through a number of questions to decide if the employee has a P45, will

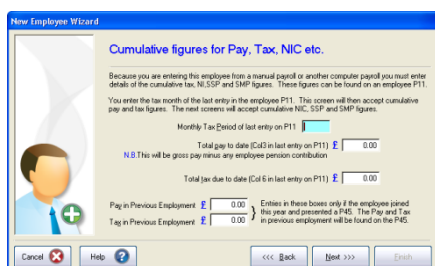
present a late P45, or needs to submit a P46. The answers will set the tax code and the pay and tax in the previous employment.

## Electronic transmission of a P46 or P45 part 3

When an employee gives you a P45 you should use the information to create a new employee record and then you would normally complete section 3 of the P45 and post it to HMRC. However, IRIS GP Payroll has a facility which allows you to transmit part 3 of the P45 to HMRC via the Internet, instead of posting it. When the employee's details have been entered, click the **Print Output/Export Data** button on the Main Options screen, select the **P45s/ P46s** tab and follow the instructions to transmit section 3 of the P45. For more details see the section **Error! Reference source not found..**

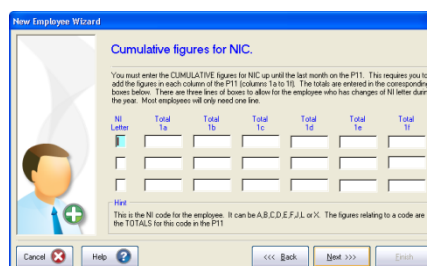
If an employee has to complete a P46, this is normally sent by the practice to HMRC and HMRC will eventually send a new employee tax code. However, IRIS GP Payroll can transmit the P46 to HMRC via the Internet. When the employee's data has been entered, click the **Print Output/Export Data** button, select the **P45s/ P46s** tab and follow the instructions to transmit the P46. For more details see the section **Error! Reference source not found..**

**Employees from other payroll systems** – If you are converting from a manual payroll or a different payroll system select the second option on the first wizard screen (**The employee details are being transferred from a manual payroll or another computer payroll system**); this will take you through four different wizard screens. The data you need to complete these screens can be found on a P11 or P11 equivalent produced from the previous payroll system. The wizard screens will instruct you in some cases to enter figures directly from the P11 (e.g. pay to date and tax to date) and in other cases will instruct you to total the columns on the P11 before entering a figure (e.g. cumulative NIC, SSP, SMP etc.).



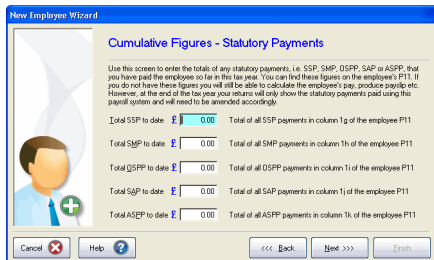
This screenshot shows the 'New Employee Wizard' screen with the title 'Cumulative figures for Pay, Tax, NIC etc.'. It contains instructions for entering cumulative figures from a P11. Fields include 'Monthly Tax Period of last entry on P11', 'Total pay to date (Col 3 in last entry on P11)', 'Total tax due to date (Col 6 in last entry on P11)', 'Pay in Previous Employment', and 'Tax in Previous Employment'. There are also checkboxes for 'Enter in these boxes only if the employee joined this new and presented a P45' and 'The Pay and Tax in previous employment will be found on the P45'.

Enter the month of the last entry on the P11. Then enter the pay and tax to date from columns 3 and 6 of the P11. There are fields for pay and tax in previous employment if the employee came to the practice from another job in the current tax year.

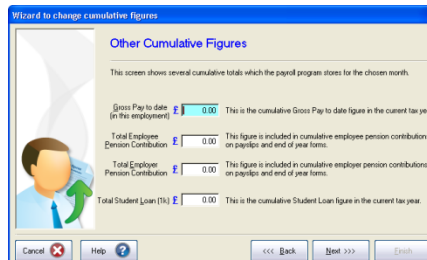


This screenshot shows the 'New Employee Wizard' screen with the title 'Cumulative figures for NIC'. It contains instructions for entering cumulative NIC figures from a P11. It features a table with columns for 'NIC Letter' and 'Total' (1a to 1f). Below the table, there is a 'NIC' field and a note: 'This is the NIC code for the employee. It can be A,B,C,D,E,F,J,L or X. The figures relating to a code are the TOTALS for this code in the P11'.

Enter the totals of the columns 1a to 1f in the P11.



This screen takes any statutory payments to date (SSP, SMP, SAP, OSPP or ASPP).



The last screen requests several other totals to date (gross pay, pension to date and student loan payments to date). This information can be found on the P11 or P11 equivalent.

## Other employee Details

When you have entered the main employee details, the employee salary details and the cumulative (year-to-date) figures you have completed the basic entry information for an employee. There are several other settings which can be entered at this point, or they can be added later. These features are described in separate chapters:

- Entering more personal details into the Employee Personal Profile (see the section **Extra employee details**)
- Entering the employee into the NHS Pension Scheme (see )
- Entering employee banking details (see )
- Allocating holidays (see **The Holiday Scheduler** section)

## Change employee details

Sometimes it is necessary to change the data held for an employee. This can happen when a new tax code or NI code has been allocated, there has been a change in the salary or a new increment date has to be added. Clicking the **Change Employee Details** button will produce a small screen with a drop-down menu allowing you to choose the employee. Clicking the down-arrow will produce a list of names. Choose the employee by clicking the name.

The main employee details screen will appear and will show the existing employee data. Move to the field you want to change and type in the new data. This new data will not be stored in the employee file until you click the **OK** button. The buttons at the bottom of the main screen allow other employee details to be changed. If you make changes to data on other screens these changes will only be saved when you click the **OK** button on the main screen.

## Change previous employment pay and/or tax - New P45

Occasionally an employee presents a late P45, or you may be informed by HMRC that the P45



which an employee gave you when starting with the practice was wrong and different figures have to be entered.

To change the P45 details, click the **Change Employee Details** button, choose the employee, and click the **Cumulative Figures** button.

Changes to the previous employment pay and tax will be integrated into the tax calculations on the next calculation of a monthly salary.

In normal circumstances you should **not** use the second option on the first wizard screen (**To View/Change the cumulative figures of tax/NIC**) to change previous employment pay and/or tax. Check with IRIS GP Payroll support before making changes with this option.

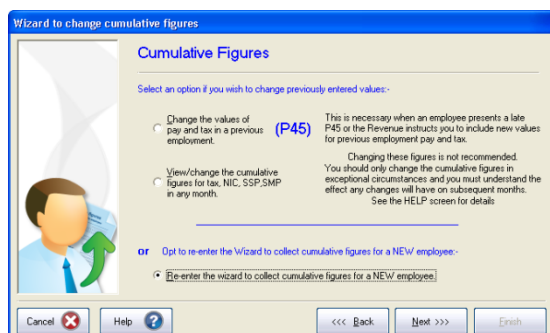


**Important note:** If the facility to link to the HMRC Message Service (see the section **HMRC messaging service**) is enabled then you do not need to use this wizard. IRIS GP Payroll will transfer any changes to previous employment pay and tax automatically when it receives the message from HMRC.

## Accept cumulative figures for a new employee

It is quite common to enter details into a new employee's main screen (i.e. name, address, tax code etc.) and store this away before adding cumulative information from a P45.

Click the **Change Employee Details** button then click the **Cumulative Figures** button. The screens which appear are different from those that are displayed when you enter an employee's details for the first time. The screens for existing employees ask if there are to be **changes** to the previous pay and tax: IRIS GP Payroll considers that it already has information about previous pay and tax, even though the values are zero.



Selecting the third option on this screen will allow you to return to the set of wizard screens which would have appeared if you were entering the employee's details for the first time.

## Extra employee details

**This chapter describes how to enter extra employee data. Many of these features are only necessary for a limited number of employees.**

The chapter is subdivided into four sections:

**Section A** - Working with the employee personal profile

**Section B** - Assigning a pension to an employee

**Section C** - Entering employee bank details

**Section D** - Creating the employee entry for the accounts software

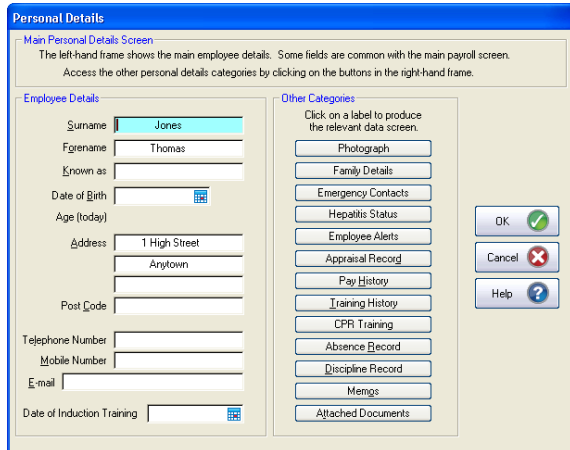
### Section A - Employee personal profile

The employee's personal profile holds a limited personnel record for the employee. It is accessed using the **Personal Profile** button on the employee's main details screen (see the section **Main employee details**). It is protected by a separate password which can be set in the Setup/Options tab **2 Passwords**. The personal profile section allows the practice manager to enter and/or examine details in the following categories:

- A photograph of the employee (helps identify employees in large practices)
- Details of the employee's family
- Emergency contact numbers
- The hepatitis immunisation status of the employee
- Up to five employee alerts
- A list of previous pay rates and increments
- A list of training courses attended by the employee
- A list of CPR courses attended by the employee
- The employee absence record
- Details of any appraisals of the employee
- Details of any disciplinary actions against the employee
- Some personal notes about the employee
- Links to documents held elsewhere on your computer, concerning the employee

## The main employee profile screen

Click the **Personal Profile** button on the main employee details screen (this button is only active if you entered IRIS GP Payroll using the Practice Manager Password). The Personal Details screen will be displayed.

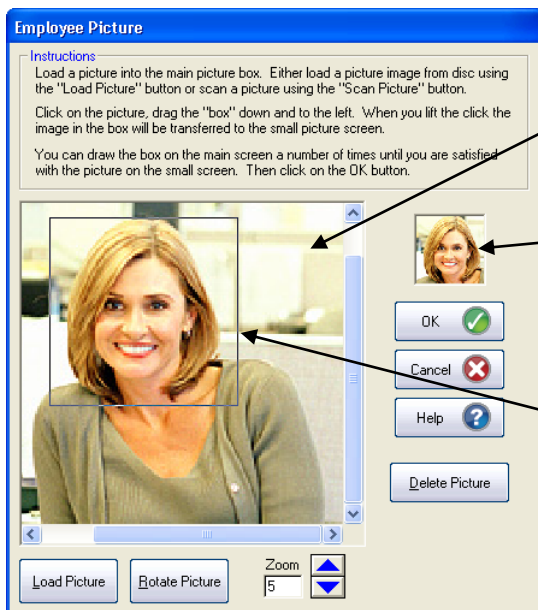


Several of the data fields on the left side of the screen duplicate data fields in the main employee details screen and any changes will be automatically transferred to the equivalent fields on the main data screen.

## Employee photographs

This is an optional facility which may be useful in large practices where it can be difficult for payroll staff to place names with faces.

The aim is to extract a head and shoulders photograph of an employee from any digital photograph or any scanned photograph of the employee and store this photograph within their payroll file. It is not necessary to obtain a passport or head and shoulder photograph of the employee because the tools on this screen will allow you to enlarge the original photograph and cut a suitable section for use in IRIS GP Payroll.



Large picture area

Small image

Capture rectangle

The original picture is loaded into the large picture area. Use the **Load picture** button if the picture is available as a digital image on the hard disk or in a digital camera (which has been connected to the computer). IRIS GP Payroll will display a typical browse screen allowing you to search for and select the digital image.

The picture can be enlarged with the **Zoom** arrows, it can be rotated with the **Rotate Picture** button and it can be positioned with the vertical and horizontal scroll bars. The aim is to position the employee roughly in the middle of the screen sufficiently enlarged to allow the head and neck to be captured.

To cut out a small section click the left mouse button and drag the capture box down and to the right. This small head and shoulders picture is the image that will be stored in IRIS GP Payroll and will be shown on the employee's main details screen. The quality of the final small image will depend on the quality of the original digital photograph.

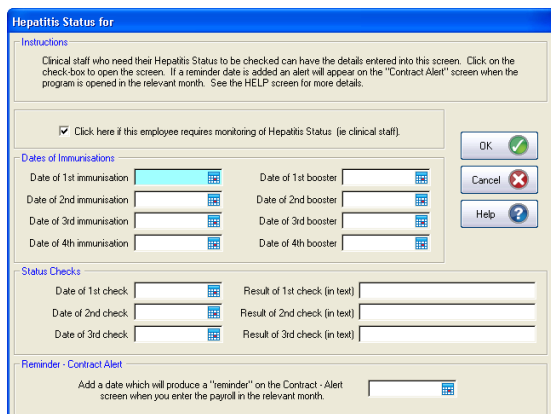
## Employee alerts

Employee alerts are designed to assist practice managers with the operation of the new GP contract. The intention is to remind the practice manager of factors relating to an individual employee which should be addressed in a particular month. For more information on Employee and Practice alerts see the section **Contract alerts**).

## Hepatitis immunisation

All health care workers, including students and trainees, who have direct contact with patients' blood or other potentially infectious body fluids or tissue should be immunised against hepatitis B. The Health Departments have issued guidance (Protecting health care workers and patients from Hepatitis B – go to [www.dh.gov.uk/assetRoot/04/07/93/07/04079307.pdf](http://www.dh.gov.uk/assetRoot/04/07/93/07/04079307.pdf)) under which all health care workers who perform exposure prone procedures should be immunised and have their responses to the vaccine checked.

This screen should only be used for employees who need their hepatitis status monitored. These employees will then be included in the hepatitis status report.



The dates of initial immunisations may not be known.

The date of the last status check should be entered. The result of the status check is entered as text (up to 20 characters).

The reminder date will trigger an alert message on entering IRIS GP Payroll in the relevant month.

## Appraisal record, previous pay scales, discipline records, training courses

IRIS GP Payroll allows you to record details of these five subjects. Clicking the relevant button of the Personal Profile screen will display a table of existing entries. To create a new entry, click the **Add** button; this will display a data entry screen. The Appraisal records and discipline records can have a Word document attached to each entry.

The method of linking a Microsoft Word document is described in the **Attached documents** section.

If you enter a date in the **Date of next appraisal** field this date will operate as an Employee Alert. An alert message will be triggered when entering IRIS GP Payroll in the month of the reminder date.

## CPR training

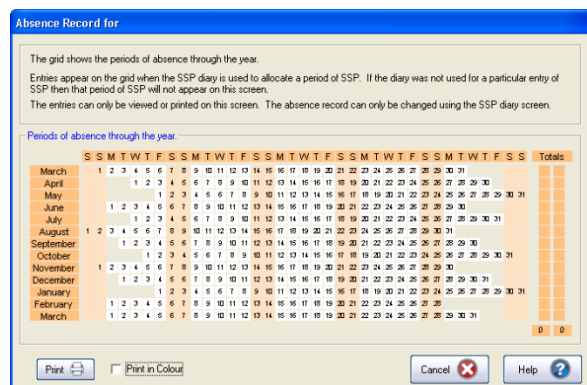
The personal profile can store information on up to ten CPR training courses for an employee. The method of entering information is similar to the method used with appraisal records and training courses.

If you enter a date in the **Proposed date of next CPR training** field this date will operate as an Employee Alert. An alert message will be triggered when entering IRIS GP Payroll in the month of the reminder date.

## Absence record

This screen is a duplicate of the SSP Diary. It will only have meaningful information if you have used the SSP Diary to record periods of absence (see the section **Using the SSP diary**).

Periods of absence will appear as light blue bars on the calendar.






The grid shows the periods of absence through the year.  
Entries appear on the grid when the SSP diary is used to allocate a period of SSP. If the diary was not used for a particular entry of SSP then that period of SSP will not appear on this screen.  
The entries can only be viewed or printed on this screen. The absence record can only be changed using the SSP diary screen.

Periods of absence through the year:

	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	Totals									
March	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31		
April		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30		
May			1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31
June		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30		
July			1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31
August	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31		
September		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30		
October			1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31
November	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30			
December		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	
January			1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31
February		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29			
March		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	

0 0

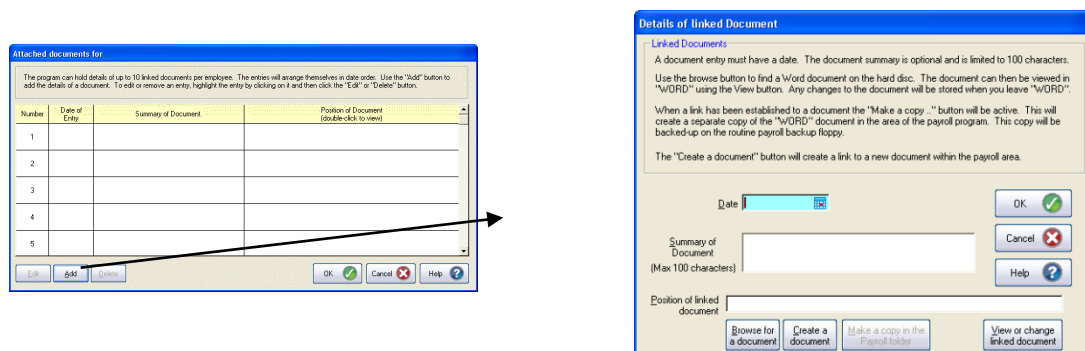
Print  ☐ Print in Colour Cancel  Help 

A printed version of the Absence Record screen is available which shows totals of absent days in each month with a total for the year.

## Attached documents

Attaching Microsoft Word documents to employee files is a powerful method of storing information about employees. Attached documents can take the form of contracts, letters to employees etc. A letter which exists outside the payroll on the hard disk can be linked to the employee file. This may be a standard letter which is linked to many employee files. Changing such a letter will cause the changes to appear in the linked letter in employee files. Separate arrangements must be made to keep a good backup of letters such as these.

Alternatively a copy of a letter can be created. This copy will be specific to one employee. These letters within the payroll area will be included in the routine backup process.



Clicking the **Add** button will display a screen to create a link. An entry requires a date and there is a field for a short summary. The **Browse for a Document** button will give you the typical browse screen to search for and choose a Microsoft Word document. The path to that Microsoft Word document will be shown in the **Position of linked document** field. The **View or change linked Document** button will open Microsoft Word (this may take a few seconds) and display the document.

If the entry is stored at this point the link will be established to a document which resides anywhere on the hard disk, but there is not a copy in the payroll area. Such a link may suffer if the linked document is moved or deleted, in which case the link would be unable to open the document.

There is a facility to create a copy of the document within IRIS GP Payroll. Clicking the button **Make a copy in the Payroll Folder** will create an exact copy of the document. IRIS GP Payroll will place a new path in the **Position of linked document** field using its own document numbering system. No changes should be made to the entry in this field or IRIS GP Payroll will lose track of the document.

There is a button to **Create a document**. This will open Microsoft Word and create a new document which will automatically be stored in the payroll area. You will see some instructions on the first page when the new document opens. These instructions should be deleted before you construct the new document.

IRIS GP Payroll will accept ten linked documents for each employee in this section. Each appraisal and disciplinary entry can have a separate linked document.

## Section B - Employee pensions

Since April 2008 there have been two NHS Pension Schemes (the 'old' and the 'new' schemes) which have different benefit arrangements. The Pension Agency publishes details of each scheme. These regulations can also be viewed at [www.nhspa.gov.uk](http://www.nhspa.gov.uk) for England/Wales and [www.sppa.gov.uk/nhs](http://www.sppa.gov.uk/nhs) for Scotland. The main points that affect the payroll are:

1. New employees who are not already members of the old scheme will have to join the new Pension Scheme
2. The employee's contribution in both old and new schemes will vary depending on the employee's annual salary
3. The ability to buy added years stopped in April 2008. Existing contracts will continue but there will be no new added years contracts.

## Employee contribution rates

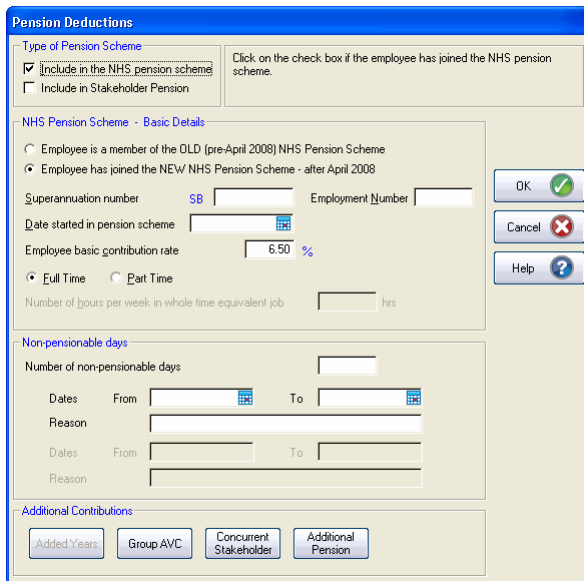
Employee contribution rates vary depending on which contribution 'tier' the employee's pensionable pay falls into. Each contribution tier corresponds to a different percentage rate. The NHS Pension Agency publishes a factsheet each year which specifies the Tiered Contributions for that year. You can download a 'PDF' version of the factsheet from the website [www.nhsbsa.nhs.uk](http://www.nhsbsa.nhs.uk).

### Notes:

- The rate for part-time employees is based on their whole time equivalent salary
- Employees who have multiple jobs within the same practice (i.e. employment category 2 in IRIS GP Payroll) will have the same contribution rate for both jobs - set by the effective whole time equivalent salary. If there is a difficulty calculating the effective WTE salary for an employee with multiple jobs (and hence the contribution percentage) you must consult the Pension Helpline. IRIS GP Payroll support cannot advise you on the correct contribution rate for part-time employees with multiple jobs because the Pension Agency have not defined exactly how this whole time equivalent salary is to be calculated
- Employees who have more than one job with different employers (e.g. a nurse who works for two separate practices) will have the tier rate set separately in each practice
- The pension details for salaried doctors and registrars will continue to be handled by the PCT/Health Authority. They will fix the percentage contribution rate - the practice is required to deduct a monthly amount for pension, as instructed by the PCT or Health Authority

## Entering employee NHS pension details

The Main Employee screen has a **Pension Details** button. Clicking this button will produce the Pension Deductions screen.



To include the employee in the pension scheme click the check box in the upper left corner.

The Pension Deductions screen has an option for the new and old Pension Schemes.

If the employee is part-time the number of hours in the equivalent full-time post must be entered.

Full-time employees in the NHS scheme pay pension contributions on the total salary but not on overtime or extra payments. Part-time employees are not deemed to work overtime until they have worked more than the hours of an equivalent full-time employee and must pay pension contributions on extra hours they work, up to the maximum of the full time equivalent post.

When a new employee is entered into the new pension scheme using Pensions Online, the joiner screen will now request certain new information (race, religion or belief, disability and sexual orientation). IRIS GP Payroll does not collect or store this information. The additional information should be entered into the online joiner screen when you want to send it to the Pension Agency.

## Employee NI code

Employees in the NHS pension scheme will have a contracted-out National Insurance code. This means that employees who normally have had an A code will now have a D code, and employees who have had a B code will have an E code. Employees who have had a C code will continue to have the same C code. These codes must be changed in the employee main detail screen before running the first payrun after joining the pension scheme.

**Important note:** Employees who are over the state pension age have a C code whether or not they are in the pension scheme.



## Employee leaving the pension scheme

Occasionally an employee may decide to leave the pension scheme. Before removing the employee from the scheme in IRIS GP Payroll you should produce a copy of the employee annual pension return (pension print folder). The details in the summary can be used to complete the document that has to be sent to the pension agency. To remove the employee from the pension scheme, un-tick the small check box (**Include in the NHS pension scheme**) in the top left corner of the pension screen. Once an employee has been removed from the pension scheme it is not possible to produce the employee annual pension return.

Remember to change the employee NIC code from a contracted-out code e.g. D, to a non-contracted-out code e.g. A before the next payroll calculation.

## Monthly calculation of pension deductions

When an employee has been entered into the NHS pension scheme IRIS GP Payroll will carry out the monthly pension calculations for both the employee and employer contributions. In some circumstances the normal contributions may vary, for instance when employees work extra hours, or have SSP or SMP.

Pension variations are applied using the Temporary Adjustment screen which allows adjustment of the monthly pensionable salary. This is the critical figure for the calculation of employee and employer contributions - once the pensionable salary is fixed then the calculation of contributions is automatically carried out.

## Full-time staff

The pensionable salary for full-time staff will usually equal their normal monthly salary because full-time employees cannot pay pension contributions on overtime. Full-time staff can have a backdated salary increase which may be liable to pension deduction. When a full-time member of staff is given a cash adjustment IRIS GP payroll will ask if this is to be included in the pensionable pay. If a full-time member of staff is paid for part of a month, e.g. when joining/ leaving, this will be paid as a **Special salary**. IRIS GP Payroll will ask if the **Special salary** is to be included in the pensionable pay. IRIS GP Payroll does not ask if overtime or relief payments are to be included in pensionable pay for full-time staff.

## Part-time staff

Part-time staff do not work overtime until they have worked the equivalent full-time number of hours in a month. The software will therefore ask if any overtime, relief payments, cash adjustments or special salaries are to be included in the pensionable pay. If the payment, including all overtime etc., is greater than the equivalent full-time salary, IRIS GP Payroll will warn you and ask if pensionable pay is to be limited to the full-time equivalent pay. This limit will normally apply unless the employee has had a backdated pay rise that month.

You can adjust the pensionable pay by answering the questions which the software asks when any temporary adjustment is given. You can also double-click the pensionable salary field directly and a separate window will appear. This new window will allow you to add overtime/cash adjustment/relief pay/special salary into the pensionable pay.

You can also enter any pensionable pay directly into the pensionable pay field, effectively overriding the calculation of pensionable pay. When only a portion of an employee's work qualifies for the NHS pension the pensionable pay can be limited.

## Non-Pensionable Days

Also known as **Disallowed** days, **Non-Pensionable** days are deducted from the employee's qualifying and reckonable membership for the pension scheme. Enter the number of **Non-Pensionable** days then enter the dates and the reason - for example the employee may have taken unpaid sick leave or have been absent because of industrial action. The information entered will be included on the **NHS Superannuation Scheme - Annual Return (SD55)** printed at the end of the year. The **Non-Pensionable** days information is cleared when you move into the next tax year.

## Additional Contributions

The buttons in the Additional Contributions section of the Pension Deductions screen open screens which allow you to enter details of the employee's arrangements for paying extra amounts into their pension.

The **NHS Pension Scheme - Added years** button is only enabled if the employee is in the old pension scheme. Clicking this button allows you to enter either a fixed amount or a percentage of salary to be deducted each month.

The **Group AVC** button opens a screen which allows you to specify which scheme provider the employee is in and the percentage of monthly salary/ fixed monthly payment the employee contributes. (In Scotland employees are limited to paying the fixed monthly amount, they cannot opt for a percentage of monthly salary.)

Normally any concurrent stakeholder contribution will be paid directly by the employee to the stakeholder provider. In the rare event that the concurrent stakeholder contributions need to be deducted from the payroll you can click the **Concurrent Stakeholder** button and enter the details. You need to specify the provider (Standard Life or Prudential) and the monthly contribution (gross); IRIS GP Payroll calculates the net figure that will be deducted from the employee payslip and forwarded to the pension provider.

The **Additional Pension** button can be used to enter NHS Additional Pension Contributions. You can configure up to 20 additional pension contributions, both monthly instalments and lump sum payments. When your employee decides to pay additional pension contributions he/she will give you a form AP1 which you need to check then send to the pension agency. The agency will then send you a letter containing the additional pension reference number, start date, payment amount and end date if applicable. Once you have this information you can use the **Add Additional Pension Contribution** screen to enter the details. Note: IRIS GP Payroll calculates tax differently on additional pension contributions depending on whether they are paid as monthly instalments or as a lump sum. In simple terms, monthly instalments get tax relief but lump sum payments do not.

## Staff on SSP or SMP

The pensionable pay has two fields, one for the employee pensionable pay, and one for the employer pensionable pay. These figures will be identical unless the employee is being paid SSP and/or SMP and the total monthly payment is less than the normal monthly salary. In such a situation the employee pays contributions on the actual payment received whereas the practice pays the normal employer's contribution based on the usual monthly salary. The SSP and SMP Wizards will set the pensionable fields automatically. If an employee has AVC payments these are based on normal salary when on SSP or SMP.

After you have calculated the payroll, any changes to the pensionable pay will be stored and will be used if the payroll has to be recalculated.

## Calculation of hours worked by part-time employees

Part-time employees are credited with a percentage of a full year's pension depending on the number of hours worked throughout the year. IRIS GP Payroll calculates the effective number of hours worked each month and this is totalled for the annual return. On rare occasions the estimate of hours worked can be wrong. This may happen:

- If an employee is given a **Cash adjustment**. The software converts this to effective hours by dividing the cash adjustment by the basic rate per hour
- If a member of staff was allocated extra pay by giving overtime hours at a nominal £1.00 per hour
- If a relief payment was made at a rate of pay different from the employee standard rate of pay

You can change the estimate of hours. In the pensionable pay window of the Temporary Adjustment screen there is a field which shows the calculation of effective hours. You can click this field and enter a corrected value on the rare occasion when the estimate is wrong. The annual return will show the new entry of effective hours to ensure that the employee receives the correct pension benefit.

## Print-outs of pension information

To produce printed statements of NHS pension data click the **Print Output/ Export Data** button in the Main Options screen then select the **Pension Summaries** tab. You can print a monthly statement (GP1) for payment to the Agency each month. The annual return statement can be printed from this screen, or as part of the general end-of-year procedures.

## Stakeholder pensions

Employers with more than five employees must arrange for their employees under the age of 55 to have access to a stakeholder pension scheme. As most employees in general practice can join the NHS Pension Scheme it is only in exceptional circumstances that an employee will need to be offered a full Stakeholder pension. The Employee Pension screen (see the section

**Entering employee NHS pension** details) has a separate option to input Stakeholder details. The HELP screen has full details about individual fields.

### Section C - Employee banking details

IRIS GP Payroll can pay employees' salaries directly into their bank accounts. Most practices prefer this to producing cheques for all employees every month.

Chapter 9 (Direct Bank Payments) explains how the direct banking facility is set up and how it operates each month. If the employee is to be paid via direct banking you must enter the employee's bank details at this point. Clicking the **Bank Details** button will open a screen to enter these details. You must enter:

- The name of their bank (e.g. Barclays Bank)
- The branch name
- The bank's sort code (e.g. 56-76-76)
- Their personal account number (e.g. 45363865)
- The account name (if different from their own name)

If no banking information is added for employees they will have their cheques produced in the normal way and they will not be included in bank summaries or bank transfer files.

### Section D - Employee accounts details

An interface allows direct transfer of payroll details to IRIS GP Accounts (formerly Maclean McNichol Accounts Software). The links to the accounts software is enabled using the Setup/Options tab **8 - Accounts Link** (consult the associated HELP screen for full instructions).

When the accounts link has been switched on the employee's Accounts Details button (on the employee's **Details** screen – see the section **Main employee details**) will be active. Clicking the **Accounts Details** button will display a screen that allows you to define how that employee's entry will appear in the accounts expenditure ledger.

Choose an expenditure code from the code drop-down menu and, if required, choose a subcode from the subcode menu. The text that appears in the accounts entry defaults to the employee name plus '(pay)'. You can change this by clicking the text field and entering the desired text.

If you wish to use the accounts link you must complete the Accounts Details screen for every employee. IRIS GP Payroll will refuse to transfer a monthly payroll if it finds that any employee does not have an expenditure code and subcode. (The exception is doctors/partners. The accounts transfer will operate whether doctor/partners are given an accounts link or not).

## When an employee leaves

You can indicate that an employee has left by entering a leaving date. Employees with leaving

dates will no longer appear on payruns, but any payslips produced before the leaving date was entered will be included in monthly summaries and budget statements. When an employee leaves the practice the data is not deleted. The presence of a leaving date in an employee's file simply means that no further payslips are to be calculated.

Employees who have been given a leaving date will remain on the software until the end of the tax year. An end-of-year return will be produced for these employees, together with an end-of-year deduction working sheet. The employee data will only be deleted when the employee files are transferred into the next tax year.

IRIS GP Payroll can print and/or transmit a P45 when an employee leaves.

## Entering a leaving date

Click the **Enter a Leaving Date** button of the Main Option screen. Choose the employee from the list. Enter a leaving date in the format dd/mm/yyyy or select a date from the calendar.

It is possible to produce a deduction working sheet for a leaver.



When you print the end-of-year summary the date of leaving is shown for leavers. The end-of-year summary should be submitted to HMRC in the normal way.

## Removing a leaving date

Occasionally it is necessary to remove a leaving date to allow further calculations to be made with the employee's data. Click the **Enter a Leaving Date** button of the Main Option screen then click the **Remove the Leaving Date** button. (The **Remove the Leaving Date** button will only be active if the employee already has a leaving date.)

## Printing a P45

A supply of P45s (laser-sheet) must be obtained from HMRC. They can be ordered from the HMRC Orderline, telephone **0845 7 646 646**. Each P45 has four sections - parts 1, 1A, 2 and 3.

To print P45s click the **Print Output/Export Data** button on the Main Option screen then click the **P45s/P46s** tab. Select **Print a P45** and choose an employee – the employee must have a leaving date. If the employee has died, click the **Deceased** tick box. This will ensure that a **D** is printed in the box on the bottom of the P45. Click **OK** to open the **Print a P45** window.

Before printing your first P45 (or if you have a new printer) you should check the alignment of the printer. Click **Check Alignment** then follow the instructions on the screen.

Check that the vertical position of the Xs is correct. The Xs should lie in the mid-section of the white data fields.

The **Up/Down Position Correction** frame can be used to correct the position of the text. Decide if the text is to move up or down on the sheet. Click the corresponding button and enter the number of millimetres the text has to move. Repeat this until the vertical position is satisfactory. The horizontal position is set in the same way. Try to position the XXs in the mid-section of their fields.

IRIS GP Payroll will store the final alignment setting and this setting will be used when printing any P45s in the future. The settings will have to be checked again if the printer is changed.

Place the first P45 sheet in the printer and click **Print Sheet 1**. Continue placing the P45 sheets in the printer in order and clicking the appropriate print button.

## Transmitting a P45 (part 1)

It is possible to send part 1 of the P45 to HMRC electronically and simply print parts 1a, 2 and 3. The option to transmit part 1 is available on the same screen as above - Print Output/Export Data, P45/P46 (see **Error! Reference source not found.** in the section **Electronic links to HMRC**).

## Paying the employees

### Overview

A monthly payrun is carried out in six steps:

- Choose the month or tax period
- Enter the Payslip Date
- Make temporary adjustments for some employees (for example: overtime, SSP or SMP payments) - temporary adjustments will only apply to the payrun for that month
- Calculate the payroll
- View or print the employee payslips, summary of payrun calculations, employee P11s etc.
- Process direct bank payments and/or links to the accounts software

IRIS GP Payroll will warn you if you have entered increment dates for the employees and an employee has an increment date this month. You can either ignore the warning and continue with the payrun or exit to the Main Option screen to enter the new employee salary and new increment date.

Relief staff initially appear with no standard salary. They will only appear on the payrun if the temporary adjustment facility is used to give them a salary, overtime, a cash adjustment or a relief payment. If a relief member of staff has been given an adjustment in a month he/she will receive a payslip and be included in summaries and reimbursement statements for that month.

The date printed on the payslips is taken from the Date on Payslip field. This defaults to the date you entered the last time you used the Temporary Adjustment screen. You can change the date by clicking the calendar icon and selecting a date, or by typing in a new date.

A payrun is usually run for all practice staff. Occasionally it may be useful to skip an employee in a payrun if certain information is not to hand. The calculation for that employee can be carried out at a later stage by using the facility to run a payroll for a single employee. This ability to calculate the payrun for a single employee can also be used to correct any error in a particular employee's calculations without having to recalculate the payroll for all employees.

### The Temporary Adjustment screen

After choosing the tax period for the payrun the Temporary Adjustment screen will be displayed.

This screen allows you select the correct date for the payslips and to enter adjustments to individual employee payments for the current month. These adjustments can override normal settings such as monthly salary, or they can be the addition of overtime, SSP or SMP for that month.

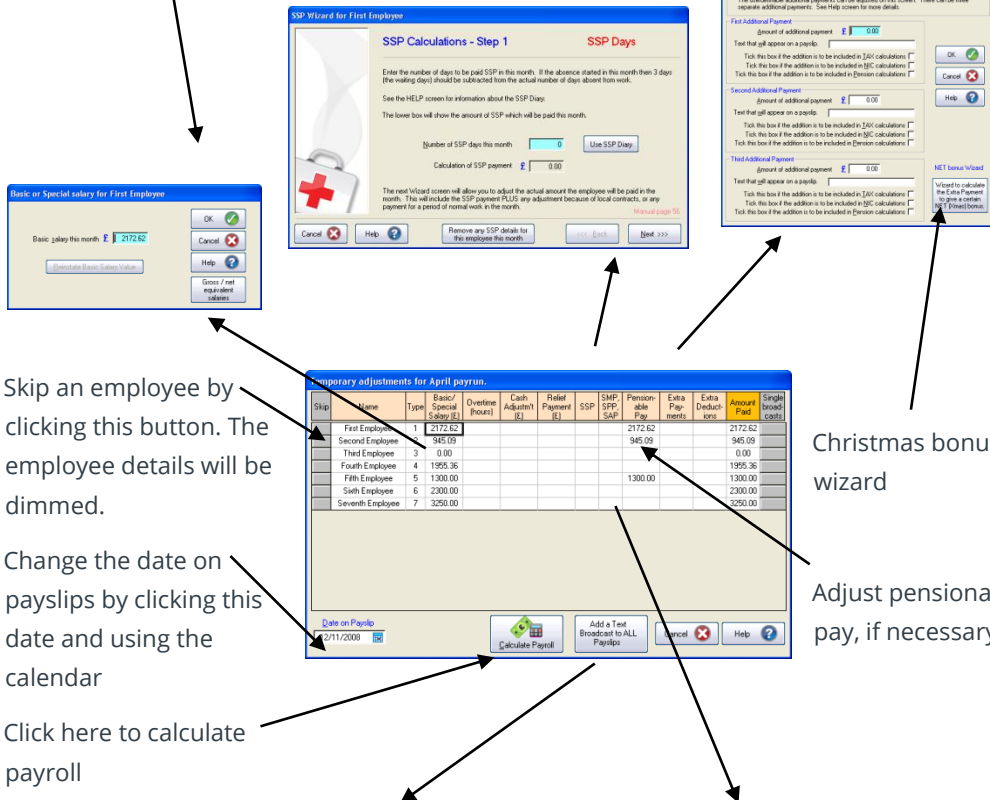
To change or add to individual items, double-click the data box beside the employee (e.g. double click the overtime box). Alternatively, move the cursor using the arrow keys on your keyboard and press the RETURN key.



Several points should be noted:

- To skip an employee, click the extreme left-hand button. The employee details will be dimmed
- To change the date on payslips, click the date field and use the calendar (or type in the new date)
- To adjust any pay figures for a registrar or a doctor/assistant, double-click in any of the first four amounts fields on that line (i.e. Basic/ Special Salary to Relief Payment) – this will display a screen that allows you to enter/change the figures
- To adjust the monthly drawings for a doctor/partner, double-click in any field on that line, this will display a screen that allows you to enter/change the drawings amount. If the monthly drawings are set to zero then no payslip will be produced
- Clicking in the Pensionable Pay box will display a screen which allows you to set the pensionable pay directly
- A Text Broadcast can be printed on all employee payslips
  - Clicking the broadcast button at the bottom of the screen will display a screen that allows you to enter the text of the broadcast to be printed on all payslips
  - Alternatively, a broadcast to an individual employee can be entered by clicking the appropriate button on the right of the screen
  - After a broadcast text has been entered for one employee the same text can be entered for another employee by clicking that employee's broadcast button and clicking the **Use Same Text** button
  - A red tick on a broadcast button indicates that an individual broadcast has been entered. The tick will be yellow if all employees have been given the same broadcast
- Employees with more than one post (type 2) can have separate adjustments made to the individual post salaries, overtime payments, cash adjustments etc.

Net/Gross calculator



**Add a Text Message Broadcast**

Broadcast on Payslips:  
This screen will accept a text message which will be printed on all employee payslips this month.

Enter the text and click on "OK". The text is limited to two lines on the payslip. A warning will appear if the entered text is too long for the 2 lines.

Broadcast Text:  
Enter the text as you would with a word processor - do not use carriage returns.

OK Cancel Help

**Wizard for Statutory Maternity Pay (and SPP/SAP) - First Employee**

**Maternity, Adoption or Paternity leave?**

The computer can allocate SMP (or SPP or SAP) to the employee. You must choose which statutory payment applies to this employee.

- ☒ Allocate Statutory Maternity Pay (SMP)
- ☐ Allocate Statutory Paternity Pay (SPP)  
(This includes SPP after a birth or adoption)
- ☐ Allocate Statutory Adoption Pay (SAP)

**SMP/SPP/SAP reimbursement**  
The package is set to claim Small Employer's Relief. This means that all SMP/SPP/SAP will be reclaimed from HMRC, both NICs and employers'. It can be switched off in "Setup/Options screen 1".

Cancel Help Back Next >>>

### Several adjustments can be made:

- **Basic or Special Salary** - This screen shows the employee's basic salary (or drawings for a partner). If you change the figure in this field IRIS GP Payroll will consider it a **Special salary** and will pay this special amount this month, ignoring the normal basic salary. It is particularly useful when an employee joins or leaves the practice mid-month and therefore does not receive a full month's salary. If the basic salary is changed to a special salary there is an option to re-establish the basic salary.  
It is possible from this screen to enter a calculator which will carry out Gross-to-Net and Net-to-Gross calculations. You may wish to know what entry in the Special Salary field will lead to a particular net payment to an employee.
- **Extra hours (Overtime)** - Approved or Non-Approved Overtime - Extra hours can be added to an employee using the **Details of Overtime** screen and will lead to an overtime payment which is added to the monthly salary before calculation of tax and NI deductions. The extra hours will be paid at the overtime rate declared in the employee's main file unless this rate is also temporarily changed. The approved extra payment will be charged to the budget which applied to the post, whereas non-approved overtime will not be charged to the declared budget.
- **Cash adjustment** - Using this screen, you can enter any positive or negative value which will be added to (or subtracted from) the employee's standard salary. This will be done before calculation of tax and NI deductions. It can be used to correct previous errors in payment, to include bonus payments and to include backdated pay rises (except for trainees - see below). The adjustment will be included in the amount charged to the declared budget.
- **Relief payments** - A payment can be made to an employee for relief work or to a relief member of staff. The payment is treated in a similar way to a **Cash Adjustment** and is charged to the declared budget.
- **Extra additions and Extra deductions (user-definable)** - These figures can be adjusted by double-clicking the relevant column. The amount, text on payslip or tax/NIC/pension settings can be varied for this month only.
- **SSP and SMP** - For full details of entering SSP, SMP, OSPP, ASPP or SAP using the SSP and SMP Wizards see the sections **Statutory sick pay** and **Statutory maternity pay and OSPP/ASPP/SAP**.
- **NHS Pension contributions** - If the employee has been entered into the NHS pension scheme you may need to adjust the pensionable pay when other items such as overtime, cash adjustments or SSP are added. IRIS GP Payroll will offer to adjust the pensionable pay automatically when other adjustments are added. These automatic adjustments can be accepted or you can view and change the pensionable pay directly.

The **Pensionable Pay** screen can always be used to adjust the pension contributions in any abnormal situation. The employee and employer pensionable pay can be adjusted separately. The employee and employer contributions will be calculated from the values in the pensionable pay fields

## Temporary adjustments to registrars

The registrar adjustment screen differs from that of employed staff. The actual payments to the registrar are displayed and any or all fields can be adjusted.

The ability to calculate any backdated salary payment was removed in April 2008 because of the change in pension calculations. A practice must now rely on the PCT/Health Authority to inform it of any backdated salary payment and associated increase in the pension contributions. The extra payment and any extra pension contribution can be added on the **Basic/Special Salary** screen.

In some areas the registrar's car allowance has been discontinued. If there is no car allowance then you should enter a zero in the car allowance field of the **Pay Details** screen. Any separate mileage allowance should be added using the Extra Payments facility of the Temporary Adjustment screen. If the rate per mile is less than 40p then the extra payment can be made without tax/NIC deductions. If the rate is greater than 40p per mile then two entries are required - one entry which is tax/NIC free for 40p per mile and one entry for the payments above 40p per mile which will be liable to tax and NIC.

## Temporary adjustments for Doctors/Assistants

The doctor/assistant screen differs from that of employed staff. The doctor/assistant Temporary Adjustment screen allows you to change the actual payment each month. This single screen will open if you click any of the first four columns associated with that doctor. The doctor/assistant is allocated a **Special Salary** of the actual payment due to him/her in the month. **Care should be taken to adjust the pension contribution.**

SSP and SMP for doctor/assistants are entered in the usual way.

## Temporary adjustments to Doctors/Partners

The only adjustment available for doctors/partners is an adjustment to the monthly drawings figure.

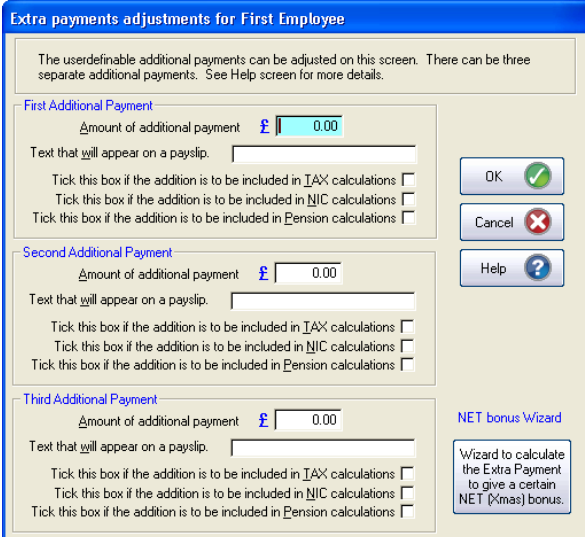
- There is no calculation of tax or NIC for partners
- Partners' pension contributions are calculated at another time
- Partners do not receive SSP, SMP, OSPP, ASPP or SAP under the normal statutory scheme

For these reasons clicking any part of the doctor/partner line will display the same screen which allows you to change the monthly drawings. If the monthly drawings figure is set to zero there will be no payslip produced for a partner.

The button to add a broadcast remains active for doctor/partners but any broadcast will only be relevant if a monthly drawing figure has been entered to cause a payslip to be produced.

## Calculating a net bonus

Some practices like to pay a net Christmas bonus to staff. This is achieved by making an extra payment to each employee such that the net figure on their payslip, after tax and NIC deductions, will be increased by the desired amount. In the past the calculation of this extra payment was a time consuming process.



The Net bonus wizard button will lead you through a set of wizard screens. The amount of the net bonus is entered and the wizard then calculates the extra payment necessary to give that net bonus.

## Storing temporary adjustment figures

If temporary adjustments are added in a month and the payroll calculations made, the temporary adjustment figures are stored and are available if the payroll is to be rerun. If that month's payroll is rerun IRIS GP Payroll will tell you that there are temporary adjustments for that month and ask if they are to be used again. There is an option to discard the previous adjustments and start again.

If you exit from the Temporary Adjustment screen before carrying out the payroll calculations you will be asked if you want to reject or store any temporary figures that you entered. If you delete the temporary adjustments for a month by mistake (by choosing the wrong option) this does not affect the figures in payslips or in monthly summaries etc. unless the monthly payroll is recalculated with the temporary adjustments missing.

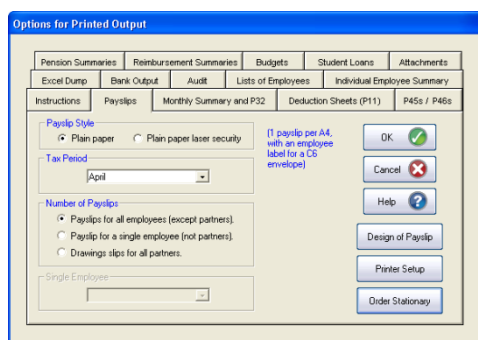
## Reporting and printing after a payrun

After a monthly payrun has been calculated the IRIS GP Payroll can produce output in a variety of forms.

- Print or view payslips for all employees or for a single employee
- Print or view a summary of the payroll calculations and a P32
- Print or view the Deduction Working Sheets (P11s) for employees
- Print NHS Pension statements
- Transfer employees' payments directly into their bank accounts
- Transfer payroll data directly to IRIS GP Accounts
- Produce budget or reimbursement summaries (see the section **Staff budgets**)
- Dump payroll data to a file for transfer to a spreadsheet (see the section **User-defined summaries and transfers to Microsoft Excel**)
- Print individual employee summaries with personal details

Most printed summaries can be printed in colour if a suitable printer is available.

## Payslips

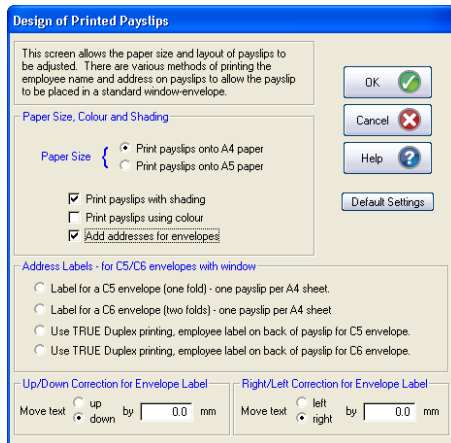


There are two types of payslip available – plain paper payslips (which can be printed two to an A4 page) and laser security payslips. The laser security stationery incorporates a pre-applied adhesive strip around the outside, and a see-through window to display the employee name and address, ready for the payslip to be folded, sealed, stamped and posted.

When printing payslips, you can use the **Order Stationery** button to connect to our online store, where you can purchase your payslips.

## Plain paper payslip design

You can change the design of plain paper payslips using the **Design of Payslip** button (the button changes to **Set Alignment** if you choose security payslips). You can also access the plain paper payslip design options from **Setup/Options** tab 1 – **Program Options**.



## Shading and/or colour

You can use the options on this screen include shading and/or colour in your plain paper payslips. The shading setting improves the appearance of payslips by printing different shades of grey in the heading and body sections of the payslips. The colour selection will print the shaded areas in blue tones, but this will only work on a colour printer.

Choosing colour will automatically select the shading option.

## Paper size

The default setting for plain paper payslips is to print two payslips onto an A4 sheet which can be divided to produce the individual sheets.

The A5 setting is only possible when the printer is capable of printing on A5 paper. In most printers A5 paper (half the size of A4 paper) is loaded via the manual paper feed rather than the paper drawers. One payslip will be printed on each A5 sheet. This removes the need to divide A4 sheets and tends to produce a neater payslip.

## Name and address on payslips

This option allows the employee name and address be printed on the plain paper payslip so it can be placed directly into a window envelope. IRIS GP Payroll can produce payslips for use with industry standard C5 and C6 envelopes. These are readily available from any stationery supplier.

- C5 window envelope – designed to take an A5 sheet without a fold or an A4 sheet with one fold
- C6 window envelope – smaller than a C5 envelope. Designed to take an A5 sheet with one fold or an A4 sheet with two folds

The window position on both sizes of envelope can vary from manufacturer to manufacturer. For this reason, the design screen has up/down and right/left adjustments to position the employee name and address within any window position.

If you wish to use windowed envelopes we recommend that you try the various options on blank paper before deciding which envelope to buy. Some options allow the payslip to be placed directly into the envelope; others require the payslip to be folded.

The duplex mode is included for practices that have a printer with true duplex printing. True duplex implies printing on both sides of the paper automatically without the paper having to be re-entered into the manual hopper.

Many simpler printers offer duplex printing if sheets are re-entered into the printer after one side is printed. This type of duplex printing is not recommended because it raises the possibility of the wrong employee's name and address being printed on the back of a payslip.

### Set Alignment for laser security payslips

All printers are slightly different which means that you may find the address printed on the laser security payslip does not fit exactly in the window. Click the '**Set Alignment**' button to adjust the Up/Down and Right/Left correction. (Note: the **Set Alignment** button becomes available when you select **Plain paper laser security** as the **Payslip Style**.)

#### Note:

The employee's rate of pay can be shown on payslips (plain paper or laser security). In the employee's Pay Details screen, tick the **Show rate/hour on payslip** tick box. The Pay Details screen for employees with multiple jobs (employment category 2) also has the **Show rate/hour on payslip** tick box, plus an additional option, the **Show each post separately on the payslip** tick box - if this is NOT ticked IRIS GP Payroll will gather all payments together into one entry on the payslip.

Payslips for Doctors/Partners have a different layout. The payslip simply shows the monthly drawings figure because there are no tax, NIC or pension deductions. There is also a summary of the drawings in previous months. If no drawings figure is entered then no payslip will be produced.

### Monthly calculation summary

Monthly summaries are produced by clicking the **Print Output/ Export Data** button on the Main Option screen, then selecting the **Monthly Summary and P32** tab. The summary can be produced in two sizes. The large, two page version is more practical. The small, single page version is a convenient way of storing all payroll calculations for a month on one sheet of paper for those with laser printers and sufficiently good eyesight. Partners' drawings are not shown on the Monthly Summary.

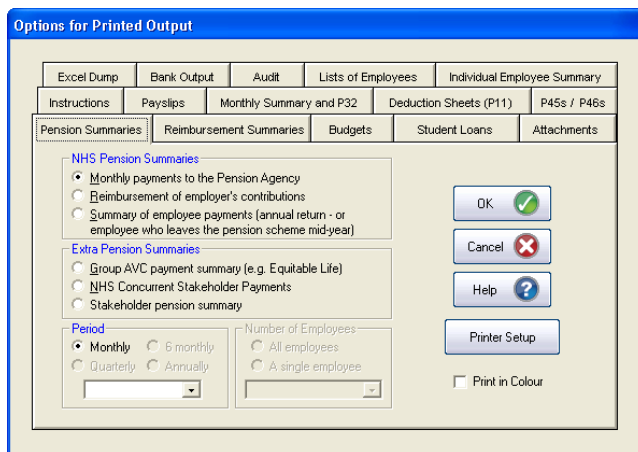
Payments to PAYE are shown on the Employer's payment record (P32). The figures can be entered into the PAYE pay-in slip and a cheque submitted to the Inspector of Taxes.

### Deduction working sheets

P11s are printed by clicking the **Print Output/ Export Data** button on the Main Option screen, then selecting the **Deduction Sheets (P11)** tab. P11s can be produced for all employees, or for a single employee. A full deduction sheet will be produced for all employees at the end of the year and it is this final version which will be kept for three years as instructed by HMRC. No P11 is produced for doctors/partners because their tax and NIC is not processed through the PAYE scheme.



## Printing pension statements



Printed statements of NHS pension are grouped together on the **Pension Summaries** tab.

The first option will print a statement (GP1) of the practice's payment to the pension agency for a month. It includes employee basic contributions, employee contributions for added years, and employer contributions, but not group AVC payments. The English/Welsh pension agency now request that the monthly figures are transferred to their website. IRIS GP Payroll will produce a summary of any employee payments to a group AVC (originally the Equitable Life AVC) and any Stakeholder pension agencies.

## Processing payments to employee bank accounts

The Print Output/Export Data screen has various options to pay employees' salaries directly into their bank accounts. For more information on Direct bank payments and e-banking see the section **Direct bank payments**.

## Producing the Employer DEO Schedule

The Employer DEO Schedule contains information about all employees who currently have a DEO; this information is required by the Child Support Agency (CSA). The schedule can be produced from the **Attachments** tab and can be created either a CSV file which can be sent electronically or as a printed report.

## Transferring figures to IRIS GP Accounts

This is carried out by clicking the **Accounts Transfer** button of the Main Option screen. The transfer places the payroll data in a file which sits between the payroll and accounts software. The next time IRIS GP Accounts is entered it will display a message indicating that a file is ready to be loaded into the expenditure ledger.

On every transfer a copy of the COMPLETE month's payroll is placed in this intermediate file to be loaded to IRIS GP Accounts. If you make a transfer and the expenditure ledger already has a copy of that month's payroll it will suggest that you allow the software to delete the payroll figures already in the expenditure ledger.

In this way, every time a payroll is transferred to the accounts package, the latest figures for all employees and PAYE are placed in the expenditure ledger. This ensures that whenever a payrun is amended (by re-running for a single employee for example), the entries in IRIS GP Accounts can be corrected by re-transferring the latest version of the payroll to the accounts. The figures in IRIS GP Accounts will then equal the figures on the latest print-out of a monthly summary.

Every accounts entry can have a reference number, which is usually set to the cheque number associated with the expenditure. This number can be useful when reconciling the expenditure ledger with a bank account.

## Other printed summaries after a payrun

Several other forms of printed output are available after a monthly payrun. All are available using the **Print Output/ Export Data** button of the Main Option screen:

- Lists of Employees and Individual Employee Summaries
- Student Loan Repayments
- Budget statements and reimbursement statements (see the section **Staff budgets**)
- Employee and practice alerts (see the section **Contract alerts**)

## Direct bank payments

### Introduction

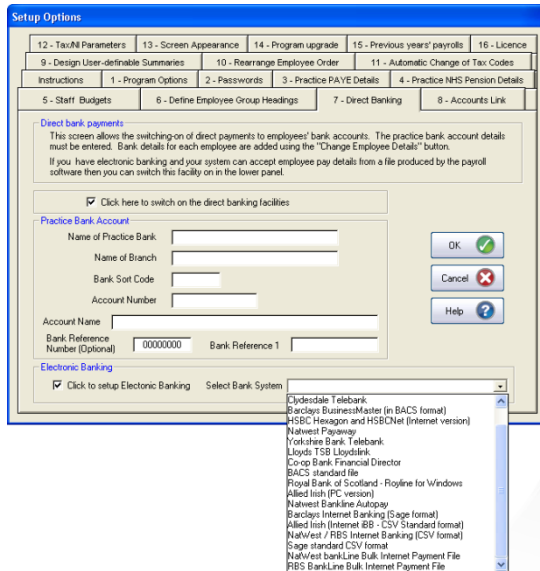
It is now more common for practices to pay employee salaries via direct bank payments instead of issuing cheques. Banks are continually changing the methods that are used to transfer payments directly from practice accounts to employee accounts however IRIS GP Payroll can produce output that is compatible with many of the new banking systems.

There are two methods of transferring payments:

- **E-banking** - Most banks can now provide practices with an electronic banking facility to operate on a practice computer. Some banks supply software which is loaded onto the PC, others now supply an Internet based banking service.  
It is important to stress that IRIS GP Payroll cannot transmit payment information directly into the banking network (as it does with transmissions to HMRC). Only software systems supplied by banks are allowed to initiate payments through the banking network. IRIS GP Payroll will create an intermediate file which it stores on the local hard disk.  
The banking system (either Internet based, or operating on the local computer) will read this file and then transmit the data into the banking network.
- **A paper based service** - A summary of payments is produced by IRIS GP Payroll. This summary is sent to the local branch and the staff payments are initiated there.

## Direct banking

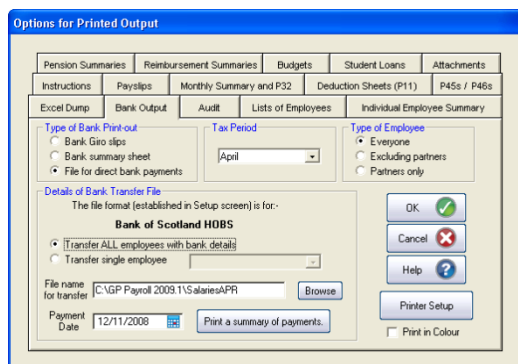
Direct banking must be enabled using the Setup/Options tab **7 - Direct Banking**. You must enter details of the practice bank account. The HELP screens will give details of the information required in each field.



There is a separate option to use e-banking if the practice has installed a computerised banking system or uses an internet banking system. The bank system is selected from the available list. This allows IRIS GP Payroll to produce an intermediate file in the correct format.

## Exporting a file for e-banking

IRIS GP Payroll can produce an export file containing the employees' net pay and banking details. This intermediate file can be in a variety of formats which are suitable for input into the main banks' electronic banking services.



The file is produced using the **Bank Output** tab of the Print Output/Export Data screen.

Choosing the third option in the **Type of Bank Print-out** section produces a screen which will accept the file details. The file name defaults to **salaries\_month** (where month is the payroll month in question). The file name or position can be reset with the **Browse** button. The **Payment Date** field will only appear if the file format for that particular bank requires it.

**The steps in the process are:**

- Calculate the payroll in the normal way
- Produce an intermediate file using IRIS GP Payroll containing the payment details for employees
- Enter the bank's electronic banking software and import this intermediate file. This will initiate payments to the staff through the bank's remittance system

The next stage in the transfer is carried out by the bank's software. You must consult the instructions provided by your bank concerning the importing of staff salary details for BACS payment. The bank's software will ask for the position and name of the intermediate file which holds the employees' payment details. This information should be entered and the bank's software should show the employee payment details on the screen. There will then be a process to transmit this information electronically via BACS to the employees' accounts. This process will vary from bank to bank.

### Using a BACS summary sheet

This is a simpler method of initiating direct bank payments which does not require a computerised banking system to be installed in the practice.

IRIS GP Payroll produces a summary sheet designed to supply data for the various banks' BACS entry schemes.

Your bank manager will advise you of the details of your local scheme. The schemes operate on the same principle - rather than sending payroll data electronically, the information is first supplied to the practice bank in paper form and it is transmitted from there to BACS.

After a monthly payrun the bank summary sheet has all the information required for a bank BACS entry scheme. Some banks will accept this sheet and initiate payments to staff. Other banks may require that some of the data be transferred to their own sheet, and some others may allow the practice to telephone the list of employee reference numbers and amounts to be paid to initiate payments.

## Statutory sick pay

### Overview

SSP details are entered using an SSP Wizard to assist you through the steps of setting SSP, establishing the correct monthly payment taking account of any local contract arrangements, and fixing the correct NHS pension deductions.

#### In broad terms the sequence of steps is:

- Decide if the employee qualifies for SSP
- Enter the number of days SSP to be paid in the month. The SSP Diary can be used at this point. IRIS GP Payroll will calculate the SSP payment
- Adjust this payment if there is a local contract which pays the employee more than basic SSP (e.g. full salary or half salary for periods of time)
- Adjust any pension payments to comply with the rules of the NHS pension scheme

If you use IRIS GP Payroll to calculate SSP you should be acquainted with the rules of the SSP scheme. These rules are set out in the SSP Manual for Employers (E14) which can be printed from the HMRC Employer CD-ROM or downloaded from [www.hmrc.gov.uk](http://www.hmrc.gov.uk) (in both cases search for E14).

### Qualifying conditions

All employees qualify for SSP payments when they are sick provided certain criteria are met:

- The period of sickness must last for four consecutive days. Such a period is known as a PIW (Period of Incapacity for Work). All days, including weekends and non-working days count towards this four day period. Thus if an employee was absent on a Thursday and also on the following Monday this would be considered a PIW even if the employee did not normally work on a Friday or the weekend
- SSP is not paid for the first three qualifying days (Waiting Days) of a PIW. Qualifying days are the days that the employee is required by his/her contract to be available for work. Parts of days count as full qualifying days: thus a receptionist who works on a Monday morning, Wednesday morning and Friday afternoon would have three qualifying days. Occasional periods of work (such as the requirement to work the odd Saturday morning) are not included in the number of qualifying days. The number of qualifying days is entered into the Employee Details screen (i.e. the screen which accepts their name, NIC code, tax code etc.) If you want to use the SSP Diary you must specify which days in the week are counting towards the qualifying days. This is entered in the **Employee Details** screen using the **Work Pattern for SSP** button. If the work pattern is not set for an employee the SSP diary will not be available for that employee.

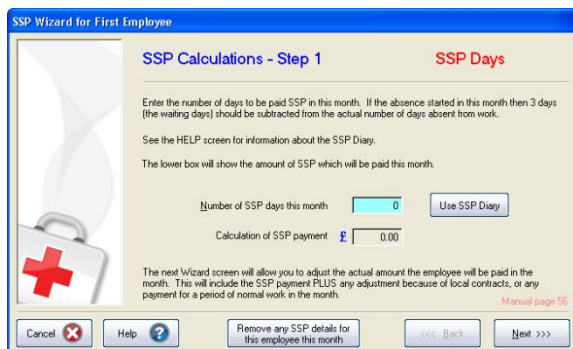
The SSP diary will only be useful for employees who have a regular pattern of work each week. If an employee has an irregular pattern (e.g. works two days one week and three days on the next week) then the diary will not be effective.

- If a new PIW occurs within 56 days of the last day of an earlier PIW the PIWs are said to be **linked** and there are no waiting days in the later PIW
- SSP entitlement continues for 28 weeks from the beginning of a PIW that does not link with any previous PIW. This entitlement is independent of any local contract for sickness payment (e.g. full salary for three months and half salary for three months). Although the practice may be paying a higher sickness benefit for part of the sickness period, the employee's entitlement to SSP is still restricted to 28 weeks from the first day of absence.
- The employee's average monthly salary must be at least £464

## What to do if an employee is on sick leave

Information about sickness absence is entered in the Temporary Adjustment screen. Double-clicking the SSP column opens the SSP Wizard.

### Step 1 Enter the number of SSP days in the month



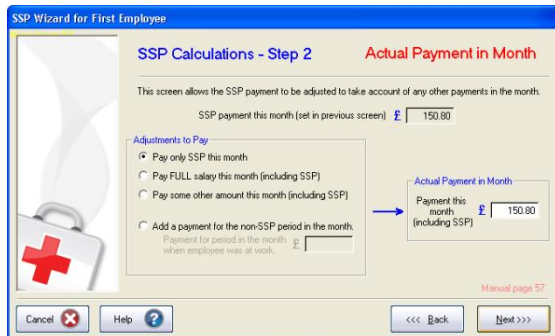
Decide if a PIW has occurred (if the employee is sick for four or more calendar days)

- Total the number of days the employee has been absent from work in the month (counting only the qualifying days, which are the days the employee was due to work in the month)
- Decide if three waiting days are to apply to this PIW (unless the PIW is linked to a previous PIW or this absence has extended from a previous month)
- Subtract any waiting days from the total number of days absent from work that month. This represents the number of days to be paid SSP in the month
- Enter this figure into the first SSP Wizard screen and click **Next**

If you want to use the SSP diary to calculate the number of SSP days in the month, click the **Use SSP Diary** button (see the section **Using the SSP diary**).

If the employee's monthly salary is below the SSP threshold (£464 per month) IRIS GP Payroll will display a screen which will allow the average monthly salary to be adjusted. This adjustment is only necessary if the employee has had overtime or other extra payments in the previous two months which could have brought the average salary over the SSP threshold.

## Step 2 Set the actual payment in the month



In most cases the employee will not just receive the SSP payment. There may be a local contract for sickness pay or the employee may have worked normally for part of the month. The second SSP Wizard screen allows the actual payment to be set.

The first option will pay the employee only the calculated SSP.

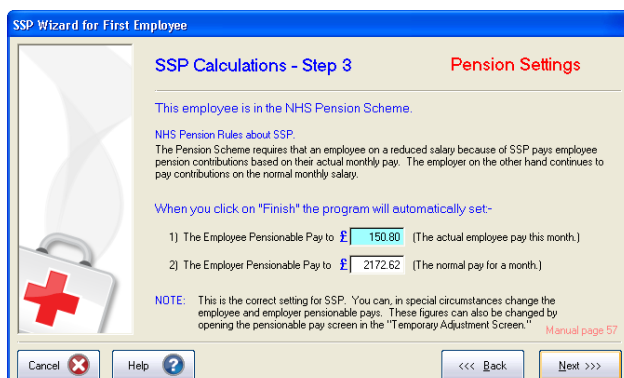
The second option will retain information about the calculated SSP but will actually pay the employee the normal full salary for the month. The second option should be selected when a local contract gives the employee full salary for a period of time.

The third option is designed for employees with a local contract but the contract payment is not full salary. Select the option **Pay some other amount this month** and enter the actual amount to be paid in the **Payment this month** field. This figure will include the SSP payment. IRIS GP Payroll will use the SSP amount to calculate if any recovery of SSP is available from PAYE.

The fourth option is used when the period of sick leave is less than the whole month and the employee is only receiving SSP for the absence period. You must enter the payment that was due to the employee for the normal working part of the month. The software will pay the employee the SSP and the payment for the normal working period.

## Step 3 NHS pension settings

If the gross pay when receiving SSP is less than the normal pay the employee pays a pension contribution on the actual pay, whereas the practice must pay the employer's pension contribution on the normal full salary.



The next SSP Wizard screen appears when an employee is in the NHS pension scheme and the gross pay is less than the normal monthly pay.

This screen is for information only, the automatic setting of employee and employer pensionable pay should normally be accepted and the **Finish** button clicked to complete the SSP entry. If there are special circumstances which require a different setting of the pensionable pay amounts the figures can be changed before the **Finish** button is clicked.



The pensionable pay settings may have to be changed again if the employee is to be allocated overtime or a cash adjustment after the SSP has been entered. The extra payments should be entered and then the pensionable pay window should be opened (third from right column on the Temporary Adjustment screen.) The employee pensionable pay should always equal the actual pay in the month. The employer's pensionable pay should equal the normal monthly salary plus any pensionable additional payments (e.g. overtime or cash adjustments).

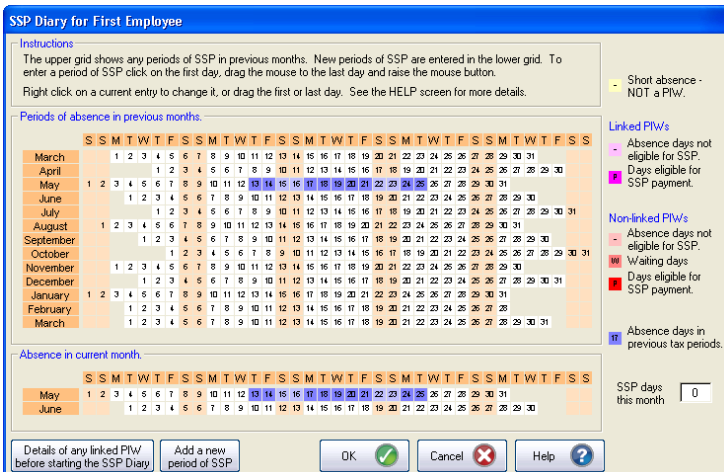
## Recovering statutory sick pay

Under normal circumstances employers cannot reclaim payments of SSP from PAYE. However to help employers who have a high proportion of their workforce absent at any one time HMRC introduced the Percentage Threshold Scheme. This compares the total SSP paid in any month with 13% of the total payments of NIC for that month (including both employee and employer's NIC payments). If the total SSP payment is greater than 13% of the total NIC payments the practice can reclaim the difference from its PAYE payment that month. This calculation is carried out automatically by IRIS GP Payroll and is shown on the P32. IRIS GP Payroll automatically removes any recovered SSP from net staff costs before it produces any budget summaries.

## Using the SSP diary

The SSP diary can be used to calculate the number of SSP days in a month. It is also a useful record of periods of sickness absence throughout the year.

An employee must have a working pattern set up using the **Work pattern for SSP** button in the Employee Details screen before the SSP diary can be used to record their absences. Clicking the **Use SSP Diary** button (see the section **What to do if an employee is on sick leave**) produces this screen:



**SSP Diary for First Employee**

**Instructions**  
The upper grid shows any periods of SSP in previous months. New periods of SSP are entered in the lower grid. To enter a period of SSP click on the first day, drag the mouse to the last day and raise the mouse button. Right click on a current entry to change it, or drag the first or last day. See the HELP screen for more details.

**Periods of absence in previous months:**

Month	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	
March	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31
April	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	
May	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	
June	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	
July	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	
August	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	
September	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	
October	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	
November	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	
December	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	
January	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	
February	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	
March	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	

**Absence in current month:**

Month	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	
May	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31
June	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	

**Linked PIW's**

- Absence days not eligible for SSP.
- Days eligible for SSP payment.

**Non-linked PIW's**

- Absence days not eligible for SSP.
- Waiting days
- Days eligible for SSP payment.

**Absence days in previous tax periods:**

SSP days this month: 0

Details of any linked PIW before starting the SSP Diary | Add a new period of SSP | OK | Cancel | Help



The upper grid is a calendar of the 2011-2012 tax year. Any absence days in previous tax months are shown with a light blue background. The entries in the upper grid cannot be changed on this screen because they were entered as PIWs (Periods of Incapacity for Work) in the relevant tax periods. These entries can only be changed by recalculating the employee's SSP in that particular tax period.

The lower grid is designed to allow you to enter periods of absence in the current tax month. The lower row of this grid represents the current tax month.

The previous month is available in the upper row. Access to this earlier month is necessary because many practices prefer to calculate their payroll in the middle of a tax month when the absence periods towards the end of the month are still not known. You must have access to this earlier month to record SSP which may have occurred after the previous payrun. The payment for any such sick days at the end of the previous month will be included in the current pay period.

In the above example May is the current tax month. The April payroll calculation may have been carried out on the 17 April. If there were any PIWs in the second half of April they can be entered and paid in the May payrun.

## Entering a period of absence

Click the first day of absence, drag the mouse to the last day of absence and release the mouse button. IRIS GP Payroll will insert the period of absence and change the background colour of each day to indicate the type of absence day. You can adjust an entry by dragging the first or last day of an entry e.g. clicking the last day and dragging the mouse to the right will lengthen the period of absence.

Entries can be deleted in two ways. Clicking the last date and dragging over the first date will remove an entry. Alternatively use the right mouse button to click over an entry which will produce a small screen with the start and end dates of the period and a **Delete** button which can be used to remove the entry.

IRIS GP Payroll will enter a 'W' on waiting days, a 'P' on days which will attract SSP payments and '-' on days when the employee would not normally be at work. If a period of absence of one to three days is entered it will appear with a yellow background to demonstrate that it is not a PIW.

IRIS GP Payroll will automatically identify linked PIWs. If a PIW is linked to a previous PIW the background colours will be shades of purple. If the PIW is a new (unlinked) episode then the background colours will be shades of red and pink. A number of separate periods of absence can be entered in the current tax month.

The number of SSP days which will be paid in this tax period is shown in the lower right corner of the screen. On clicking **OK** this figure will be transferred to the SSP Details screen (see the section **What to do if an employee is on sick leave**) to complete the SSP entry.

If you are not comfortable dragging the mouse you can use the button to **Add a New Period of SSP**. This will display a screen which allows you to enter the start and end dates of a period of absence. Clicking the right mouse button over an entry will produce the same screen which can then be used to change the start or end date of an entry.

**Important note:** When IRIS GP Payroll is upgraded to a new tax year it retains information on each employee's last PIW to allow it to calculate linkage. However if you use the SSP diary for the first time at the beginning of the year, or start in the middle of a year, the software will have no knowledge of any previous PIWs. The button in the left lower corner of the screen (**Details of any linked PIW...**) can be used to enter the details of any PIW before the SSP diary was started, which may link with a new PIW. Clicking this button will display a screen which requests the LAST day of the last PIW. It will also request the number of waiting days (of the possible three) which had not been used in the previous PIW. This will usually be zero unless the previous PIW had been short and the three waiting days had not been used.

The upper grid of the SSP Diary can also be viewed in the employee **Absence Record** section of the **Employee's Profile** (see the section **Absence record**). In that section a print-out of the record of absences over the year can be produced.

## Statutory maternity pay and OSPP/ASPP/SAP

### Overview

Statutory Maternity Pay (SMP) is the most common of the three statutory payments, therefore this chapter describes the rules and methods which apply to SMP in detail; the differences in OSPP, ASPP and SAP are discussed at the end of the chapter.

If one of your employees is about to have a period of maternity leave you should consult the E15 pamphlet which is available from the HMRC orderline ([www.hmrc.gov.uk/employers/emp-form.htm](http://www.hmrc.gov.uk/employers/emp-form.htm)). Further guidance on the employer's responsibilities throughout periods of maternity leave can be found in the document **Pregnancy and Work: what you need to know as an employer** published by the Department for Business Enterprise & Regulatory Reform (website [www.berr.gov.uk](http://www.berr.gov.uk)).

Major changes to SMP introduced in April 2007:

- All pregnant employees are entitled to 52 weeks maternity leave
- The maternity pay period was increased from a maximum of 26 weeks to a maximum of 39 weeks
- The maternity pay period can now start on any day of the week
- The weekly SMP payment rate can now be divided by 7 to allow SMP payments to be aligned with normal monthly pay periods
- A new concept of **Keep in Touch Days** was introduced, to allow employees to work up to ten days in their maternity period

The wizard to calculate the maternity pay each month allows you to enter the start date of a maternity period and details of any local contractual maternity scheme (e.g. Whitley Council, Agenda for Change). The wizard will then automatically calculate the correct maternity figures each month throughout the maternity pay period.

## Qualifying conditions

IRIS GP Payroll is designed to calculate the payments to an employee who is on maternity leave. It is not a substitute for proper records of a period of maternity leave. You must decide if SMP is due, which means that the employee must have stopped work for the practice and:

- have been employed by the practice for 26 weeks before the qualifying week (15 weeks before the expected date of delivery)
- still be pregnant at the 11th week before the week the baby is due or have had the baby by that time
- have monthly earnings of not less than £464
- have given notice at least 28 days before the date her Maternity Pay Period is due to start
- have given the practice medical evidence (MATB1) of the date her baby is due

You must complete the record sheet SMP2 which is supplied by HMRC. This records the actual weeks of the maternity pay period and must be retained for any NI inspection. The form can be printed from the HMRC Employer CD-ROM or downloaded from [www.hmrc.gov.uk](http://www.hmrc.gov.uk). Search for SMP2 in both cases.

## What to do if an employee is claiming SMP

- Obtain a MATB1 from the employee
- Look up the SMP Tables (in the E15) to find the week the baby is due (Expected week of confinement) and the Qualifying Week (15th week before the baby is due)
- Use the tables to check that the employee was employed for 26 weeks before the Qualifying week, and was still pregnant 11 weeks before the baby was due
- Check that the other conditions listed above are satisfied and establish from the employee when the maternity pay period is to start

Complete an SMP2 record sheet for the employee

## Local or contractual maternity pay

In many practices some members of staff may be offered a local maternity contract which is designed to pay more than the basic statutory scheme. This local or contractual scheme will often apply to salaried doctors (including registrars and other training doctors) and practice nurses. In some practices a superior maternity scheme may be available to all female staff.

The details of a local scheme can be set by the employing partners, the only condition being that the payment each month must be at least what would be paid by SMP. The two common schemes are:

- 8 weeks paid at full salary, 18 weeks paid at half salary plus low rate SMP, 13 weeks at low rate SMP and a further 13 weeks of unpaid maternity leave
- 8 weeks paid at full salary, 14 weeks paid at half salary plus low rate SMP, 17 weeks at low rate SMP and a further 13 weeks of unpaid maternity leave

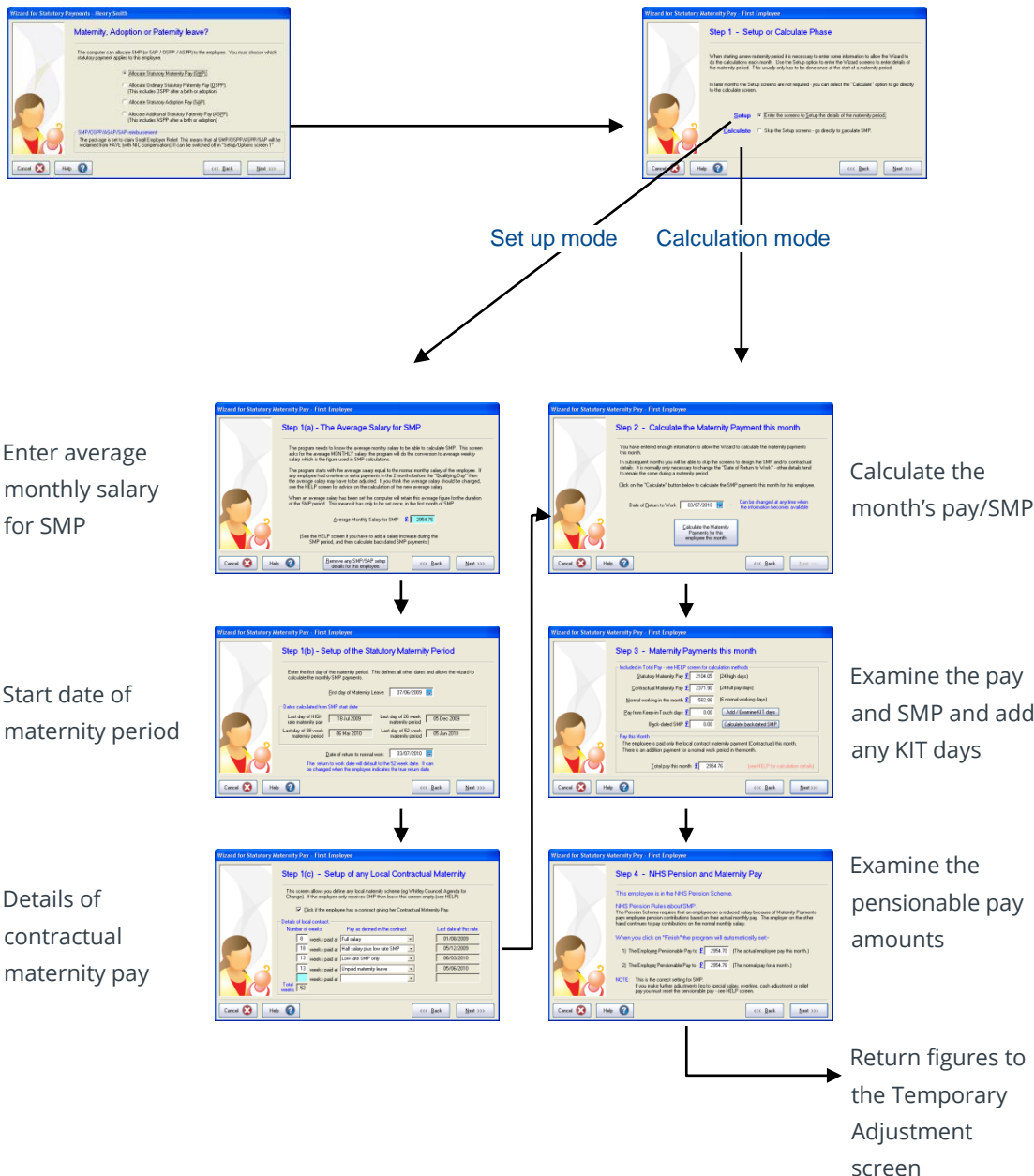
It is possible for half-salary plus low rate SMP to be greater than an employee's normal monthly salary. In this case the employee is limited to normal monthly salary.

## The SMP wizard screens

The Maternity wizard allows you to define the factors which affect the SMP period and any contractual scheme. The wizard is then capable of making automatic calculations each month until the employee returns to work. The general layout of the wizard screens:

SMP, OSPP, SAP or ASPP?

Enter set up mode or simply go to the monthly calculation



Enter average monthly salary for SMP

Start date of maternity period

Details of contractual maternity pay

Calculate the month's pay/SMP

Examine the pay and SMP and add any KIT days

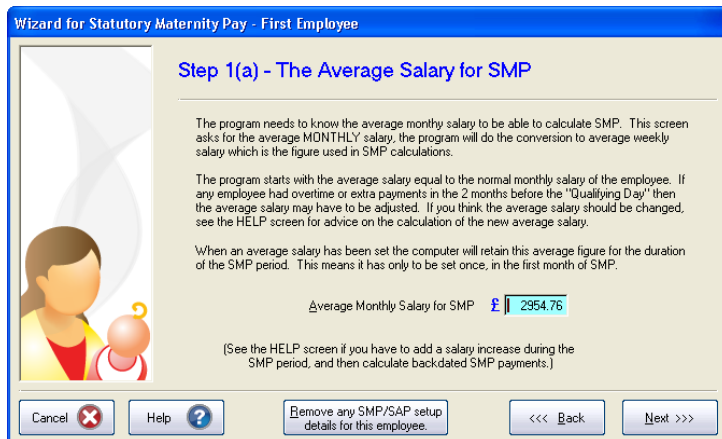
Examine the pensionable pay amounts

Return figures to the Temporary Adjustment screen

## The set up phase of the SMP scheme

After the first wizard screen you must decide if you want to enter the SMP set up screens or the screens to calculate the SMP for the month. In the first month you can only select the set up mode.

### Average monthly salary for SMP



The first 6 weeks of SMP will be paid at 90% of the **employee's average salary**. The next 33 weeks will be paid at £138.18 (unless 90% of the employee's average salary is less than £138.18 in which case the lesser amount will be paid).

The software must know the employee's average salary to carry out these calculations. As IRIS GP Payroll does not take details of the qualifying week or expected date of confinement it cannot calculate this figure accurately. The software initially shows the basic monthly salary of the employee. You should check that this basic salary is acceptable at the first payment of SMP.

To calculate the accurate average salary, the official method (described in booklet E15) is:

- Work out the period over which to average the earnings. This period ends with the last normal payday before the end of the qualifying week, and starts with the day after the last normal payday which was at least eight weeks before that
- Add together the gross payments made to the employee in that period
- Divide by the nearest number of calendar months in that period

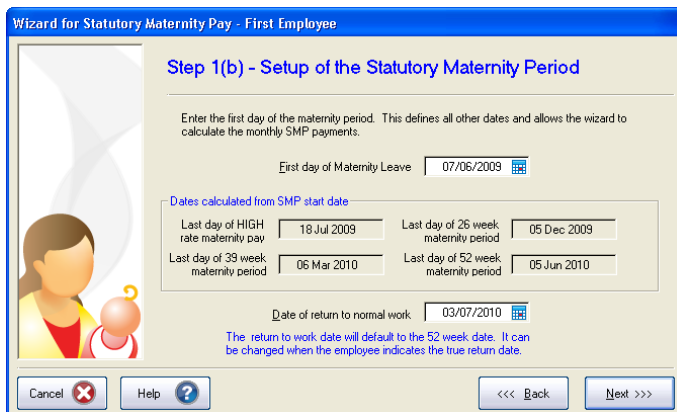
If the employee has had no overtime or extra payments in the two months before the qualifying date then the average salary shown by the software will be correct. If the employee had extra payments then you need to carry out the calculation described above. In most cases it will consist of adding the two monthly gross salaries prior to the qualifying week and dividing by two. If you calculate that the average salary is different from the software estimate, you must enter this correct value before calculations are made in the first month. If you are having difficulty calculating the average salary please call HMRC's Employer Helpline on 08457 143 143.

**Important note:** The screen above requests the average **MONTHLY** salary while the SMP regulations describe all calculations in terms of the average **WEEKLY** salary. The use of the monthly salary is to make the process easier for you. IRIS GP Payroll will do the conversions to the equivalent weekly figure.

IRIS GP Payroll retains the setting of average salary and will continue to use this setting until it is changed.

## Start date of the maternity period

The next screen requests the date of the first day of maternity leave.



**Wizard for Statutory Maternity Pay - First Employee**

**Step 1(b) - Setup of the Statutory Maternity Period**

Enter the first day of the maternity period. This defines all other dates and allows the wizard to calculate the monthly SMP payments.

First day of Maternity Leave: 07/06/2009

Dates calculated from SMP start date

Last day of HIGH rate maternity pay	18 Jul 2009	Last day of 26 week maternity period	05 Dec 2009
Last day of 39 week maternity period	06 Mar 2010	Last day of 52 week maternity period	05 Jun 2010

Date of return to normal work: 03/07/2010

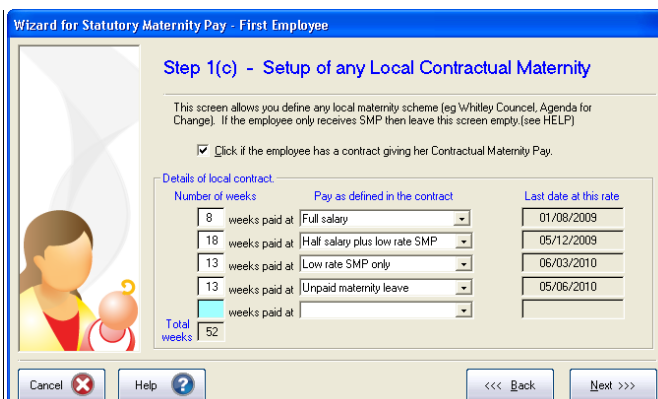
The return to work date will default to the 52 week date. It can be changed when the employee indicates the true return date.

Buttons: Cancel, Help, <<< Back, Next >>>

The wizard will automatically calculate the other important dates in the maternity period – the last day of the 26th week, the last day of the 39th week and the last day of the complete 52 week maternity period. At this stage the software sets the **return to work date** as the last day of the 52 week period. The employee has to give eight weeks' notice of the return to work date. When the true date is known it can be entered in this screen or on the calculation screen - see the section below.

## Details of any contractual maternity pay

If this employee has a contract which includes a contractual maternity scheme which is more beneficial than the standard SMP scheme then the details have to be entered into the next wizard screen.



**Wizard for Statutory Maternity Pay - First Employee**

**Step 1(c) - Setup of any Local Contractual Maternity**

This screen allows you define any local maternity scheme (eg Whitley Council, Agenda for Change). If the employee only receives SMP then leave this screen empty (see HELP)

☒ Click if the employee has a contract giving her Contractual Maternity Pay.

Details of local contract:

Number of weeks	Pay as defined in the contract	Last date at this rate
8 weeks paid at	Full salary	01/08/2009
18 weeks paid at	Half salary plus low rate SMP	05/12/2009
13 weeks paid at	Low rate SMP only	06/03/2010
13 weeks paid at	Unpaid maternity leave	05/06/2010
Total weeks	52	

Buttons: Cancel, Help, <<< Back, Next >>>

The drop-down menus supply the options available: to pay full salary, half salary plus low rate SMP, low rate SMP only or unpaid maternity leave. IRIS GP Payroll requires the full 52 weeks to be defined. This usually means including a number of weeks as unpaid maternity leave.

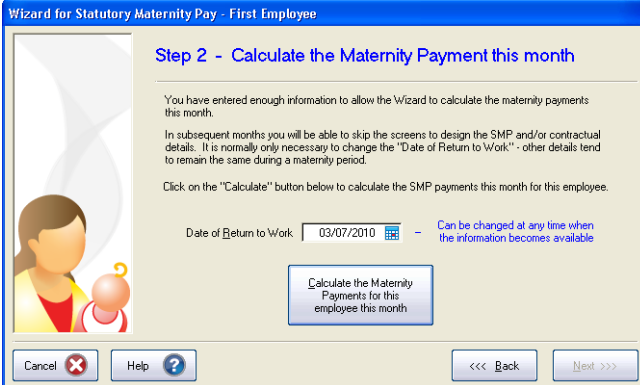
If a contractual scheme is entered IRIS GP Payroll will pay the contractual amount provided that this is greater than what would be paid by the SMP scheme. Otherwise the SMP amount will be paid. IRIS GP Payroll will always reclaim the SMP amount from HMRC (see the section



Recovering SMP from PAYE).

## Calculation phase of SMP scheme

When the design phase is complete the wizard displays the screen to carry out the pay and SMP calculations in the month. After the first month you can jump directly to this screen when there are no changes to be made to the details of the SMP and contractual maternity pay schemes.



**Wizard for Statutory Maternity Pay - First Employee**

**Step 2 - Calculate the Maternity Payment this month**

You have entered enough information to allow the Wizard to calculate the maternity payments this month.

In subsequent months you will be able to skip the screens to design the SMP and/or contractual details. It is normally only necessary to change the "Date of Return to Work" - other details tend to remain the same during a maternity period.

Click on the "Calculate" button below to calculate the SMP payments this month for this employee.

Date of Return to Work:  - Can be changed at any time when the information becomes available

The maternity wizard has enough information to calculate the pay that is due to the employee including any SMP. This pay can be made up of contractual maternity pay, statutory maternity pay and pay for normal work in the month when maternity starts and the month when the employee returns to work. Clicking the **Calculate** button will produce a further wizard screen which shows the calculated figures.



**Wizard for Statutory Maternity Pay - First Employee**

**Step 3 - Maternity Payments this month**

Included in Total Pay - see HELP screen for calculation methods

Statutory Maternity Pay	£ 2104.05	(24 high days)
Contractual Maternity Pay	£ 2371.90	(24 full pay days)
Normal working in the month	£ 582.86	(6 normal working days)
Pay from Keep-in-Touch days	£ 0.00	<input type="button" value="Add / Examine KIT days"/>
Back-dated SMP	£ 0.00	<input type="button" value="Calculate backdated SMP"/>

**Pay this Month**

The employee is paid only the local contract maternity payment (Contractual) this month. There is an addition payment for a normal work period in the month.

Total pay this month: £ 2954.76 (see HELP for calculation details)

The pay for the month will be based on the contractual maternity pay or statutory maternity pay, whichever is greater. In the first and last month the wizard will have included an amount for normal work before the first day of maternity and after the return to work date. If any **Keep in Touch days** were taken they are declared in this screen (see next page). Any additional pay from the KIT days will be added to the pay for the month.

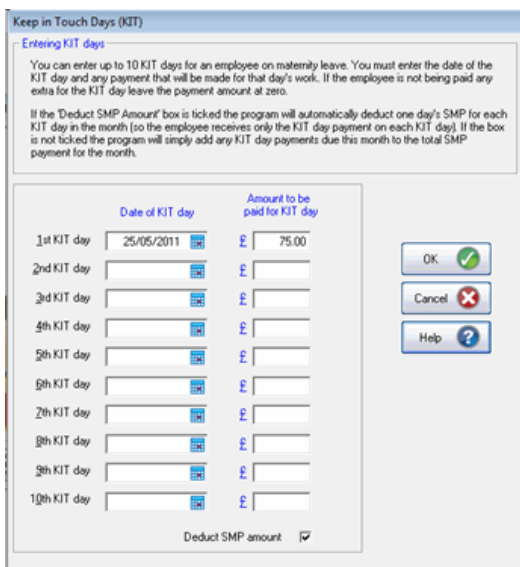
### Notes:

All of the fields can be adjusted by over-typing. The pay in the month will reflect any changes made to other fields. In special circumstances it may be necessary to change the actual pay in the month figure.

Pay for normal work before or after the maternity period is calculated on a pro-rata basis. Thus if the maternity period starts on the 15th day of a 31 day month then the wizard will allocate 14/31 of the normal full monthly salary to this normal pay period. If you wish to use a different method you can type the preferred amount into the **Normal working in the month** field.

## Keep in touch (KIT) days

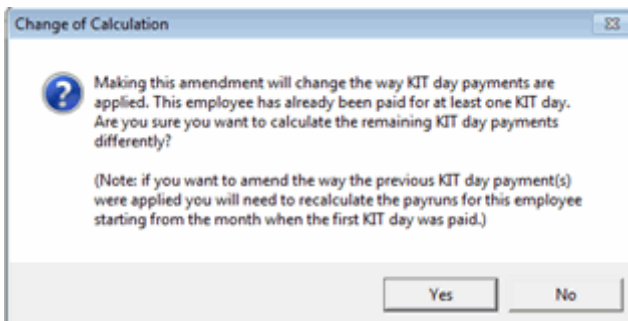
Click the **Add/ Examine KIT days** button to display a screen which allows you to add details of Keep in Touch days.



The April 2007 SMP rules introduced the concept of **Keep in Touch** days. An employee can attend work for up to ten days during her maternity leave without losing her rights to maternity pay.

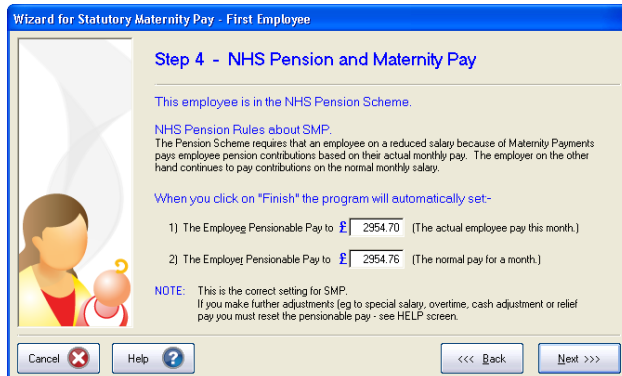
From the April 2012 update, when you set up a new Statutory Leave Period the option to **Deduct SMP amount** from the KIT day payment will be set by default. If you un-tick this option, SMP will be paid in addition to the KIT day payment. Also, if an employee is in the middle of a Statutory Leave Period when you install the April 2012 update, the new option to **Deduct SMP amount** from KIT day payments will automatically be set.

If you change the option part of the way through an employee's Statutory Leave Period and KIT day payments have already been made the following message will be displayed



## Adjustment of NHS pension payments

If the gross pay when on maternity leave is less than the normal pay then the employee pays a contribution based on the actual pay, whereas the practice must pay the employer's contribution based on the full salary. The next wizard screen appears when an employee is in the NHS pension scheme and the gross pay is less than the normal monthly pay.



**Wizard for Statutory Maternity Pay - First Employee**

**Step 4 - NHS Pension and Maternity Pay**

This employee is in the NHS Pension Scheme.

**NHS Pension Rules about SMP:**  
The Pension Scheme requires that an employee on a reduced salary because of Maternity Payments pays employee pension contributions based on their actual monthly pay. The employer on the other hand continues to pay contributions on the normal monthly salary.

When you click on "Finish" the program will automatically set:-

- 1) The Employee Pensionable Pay to £ 2954.70 (The actual employee pay this month.)
- 2) The Employer Pensionable Pay to £ 2954.76 (The normal pay for a month.)

**NOTE:** This is the correct setting for SMP. If you make further adjustments (eg to special salary, overtime, cash adjustment or relief pay you must reset the pensionable pay - see HELP screen.

Buttons: Cancel, Help, <<< Back, Next >>>

This screen will usually only be displayed for information - there should be no need to change the pensionable pay settings. On completing this screen the wizard will return to the Temporary Adjustment screen.

### Notes:

The pensionable pay settings may have to be changed again if the employee is to be allocated overtime or a cash adjustment after the SMP has been entered. In these circumstances the extra payments should be entered and then the pensionable pay should be opened (third from right column on the **Temporary Adjustment screen**.) The employee pensionable pay should always equal the actual pay in the month. The employer's pensionable pay should equal the normal monthly salary plus any pensionable additional payments (e.g. overtime or cash adjustments).

There are special rules for the calculation of pension when an employee is on unpaid maternity leave. The employee's pensionable pay is set as the value of her last month's pay (interpreted as four weeks of low-rate SMP =  $4 \times £138.18 = £552.72$ ). The employer's pensionable pay will be set to the employee's normal monthly salary. This means that the employee has to repay the practice the employee contributions in the unpaid maternity months. There can be a tax rebate in the first unpaid month which may be enough to cover the pension repayment, but in later months the negative net figure on payslips will indicate that the employee owes money to the practice.

IRIS GP Payroll does not adjust the pension deductions of registrars and salaried doctors (category 6). If the registrar/salaried doctor is paid less than the normal monthly salary then you must double-click in the '**Basic/Special Salary**' field after completing the SMP Wizard, and enter the **Special Salary**. The Pension Deduction should be set to the figure instructed by the PCT (or the prescribed percentage - 6.5% or 7.5% plus any percentage for added years, of the actual salary in the month).

## Recovering SMP from PAYE

Under normal circumstances only 92% of Statutory Maternity Pay can be reclaimed from PAYE each month. IRIS GP Payroll will carry out this calculation automatically and show the correct recovery figure in the P32.

Most practices now qualify for Small Employer's Relief when the whole payment of SMP can be recovered together with 3% NIC compensation. To qualify for this relief the practice's total National Insurance Contributions (including employee and employer payments) for the previous tax year should be less than £45,000.

If your practice qualifies you should use the Set up/ Options tab **1 – Program Options** to record this fact. IRIS GP Payroll will then automatically calculate the recovery of SMP at the higher figure of 103%.

## SAP, OSPP and ASPP

In IRIS GP Payroll the operation of Statutory Adoption Pay (SAP), Ordinary Statutory Paternity Pay (OSPP) and Additional Statutory Paternity Pay (ASPP) is very similar to the operation of SMP.

The rules of the SAP scheme are described in the publication E16 (Employer Helpbook for Statutory Adoption Pay); the OSPP and ASPP schemes are described in the publication E19 (Employer Helpbook for Ordinary and Additional Statutory Paternity Pay), both of which can be printed downloaded from **[www.hmrc.gov.uk](http://www.hmrc.gov.uk)**.

If an employee qualifies for SAP they will be entitled to 39 weeks at the low rate (£138.18 per week or 90% of average weekly salary whichever is the lower). Recovery of SAP payments from PAYE is similar to SMP recovery.

There are separate columns on a P11, P60 and P35 for SAP entries. The SMP/SAP/OSPP/ASPP wizard screens will request the number of weeks SAP in the month and go on to allow you to fix the actual payment in the month and adjust the pension contributions.

Ordinary Statutory Paternity Pay (OSPP) used to be known as Statutory Paternity Pay (SPP) before the introduction of ASPP. Only the name changed, the rules are exactly the same. If employees opt for OSPP they are entitled to two weeks' payment at the lower rate of SMP (£138.18 or 90% of average weekly salary whichever is the lower). The OSPP wizard screens will accept the OSPP weeks, allow you to adjust the actual pay in the month and adjust the pension contributions. The recovery of OSPP is similar to SMP recovery.

Additional Statutory Paternity Pay was introduced for fathers (or adopters) of babies due on or after 3rd April 2011, allowing fathers to 'take over' part of the mother's entitlement to SMP and leave. The parents cannot both be receiving statutory payments or be on statutory leave at the same time, i.e. the mother must finish her SMP before the father can start ASPP. As with OSPP, ASPP is paid at the lower rate of SMP (£138.18 or 90% of average weekly salary whichever is the lower). The father's entitlement to ASPP ends when the mother's entitlement to SMP would have ended, but he is then entitled to unpaid leave just as the mother would have been. The ASPP wizard allows you to enter the start and end dates for ASPP and the date the employee intends to return to work. The recovery of ASPP is similar to SMP recovery.

There are variations of OSPP and ASPP which apply to employees who have adopted a child. One parent can receive Statutory Adoption Pay (see above) and the other can receive Ordinary Statutory Paternity Pay (for adoption) and/or Additional Statutory Paternity Pay (for adoption). As HMRC forms P11, P60 and P35 do not distinguish between OSPP (birth) and OSPP (adoption) or between ASPP (birth) and ASPP (adoption), IRIS GP Payroll makes no distinction.

## Staff budgets

### Introduction

General practitioners no longer apply for, and receive a quarterly reimbursement of their staff costs from the local PCT or Health Authority. Doctors now receive an annual global sum in which there is an element to help with staff costs. This means that the funds available to cover staff costs tend to be fixed at the beginning of a year. There are few opportunities to increase the amount available for staff costs during the year. For this reason it has become more important to monitor the cost of staff against a staff budget throughout the year.

IRIS GP Payroll allows you to compare staff costs against defined staff budgets. There are four stages:

- Decide on the number of budgets that you wish to monitor and decide on an annual amount for each budget
- Enter the name and the annual amount of each budget into IRIS GP Payroll
- Allocate individual employees, or individual parts of an employee's costs to a budget
- View or print budget summaries each month

### Defining the staff budget(s)

The first task is to decide if there will be one single staff budget or multiple budgets. Some practices may wish to monitor staff costs against one main budget while other practices which obtain funds for staff from a number of sources may wish to compare figures against each of these sources. If a practice has one or more salaried doctors it is useful to define a separate budget for each of the salaried doctors. This ensures that there is an accurate analysis of the costs of each doctor. IRIS GP Payroll can have up to ten separate budgets.

The next task is to define the annual value of each staff budget. This should be a decision taken by the doctors and the practice manager. Before the new contract this negotiation took place between the doctors/manager and the local PCT to maximise the funds which would be reimbursed for staff costs. Since the start of the new contract this negotiation is now between the doctors on one hand and the practice manager on the other. The doctors will know approximately the funds they will receive in the year to help with staff costs and will be aware that any over-spend will have to be financed from their own profits. The practice manager will naturally wish for a suitable budget to allow for all eventualities - inflation, sickness absence, maternity leave and holiday relief.

There is no magic formula to help with this calculation. The doctors must decide how much they can afford to spend on staff. The practice manager must be aware of how staff costs may rise when extra costs for relief, sickness etc. are added.

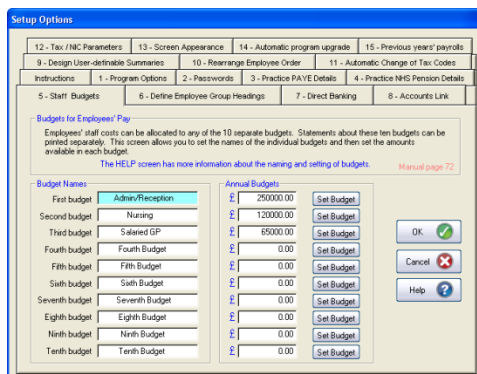
The budget should be constructed from the three items which will eventually be charged to the practice bank account:

- The gross salaries paid to employees, which will include overtime and relief payments
- The employer contribution to the NHS pension which is a set percentage of salary for all employees in the scheme: 14% for practices in England and Wales, 13.5% in Scotland and 13.3% in Northern Ireland
- The employer contribution to national insurance. This figure is difficult to calculate exactly. It will be 10.4% of an employee annual salary above £7488 per year when the employee is in the pension scheme and will be 13.8% of annual salary above £7488 when the employee is not in the pension scheme.

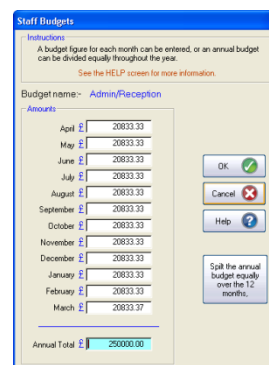
A simpler method may be to look at a typical month in the previous year (using the monthly summary printout). What was the sum of salaries (including overtime etc.)? What was the sum of employer NI contributions? What is the employer NI figure as a percentage of the total salary bill? This percentage tends to stay fairly constant for individual practices (5% to 8%) and this percentage can be used to calculate an estimate of employer's NI from the proposed total annual salary budget.

It is important that doctors take time to fix staff budgets at the beginning of the year. If they fail to do so they cannot complain if staff costs drift uncontrollably during the year and they are then disappointed with the level of their final annual profit.

## Entering budget definitions



The details about the staff budgets are entered into the Setup/Options tab **5 – Staff Budgets**. The number of budgets and the budget names should be established before any employee budget settings are made (see the next section).



You should change the budget names in the left hand column of the first screen to more meaningful names. The default names are **First Budget**, **Second Budget** etc. You could change these to **Main Staff Budget** and **Nurses Budget** for example.

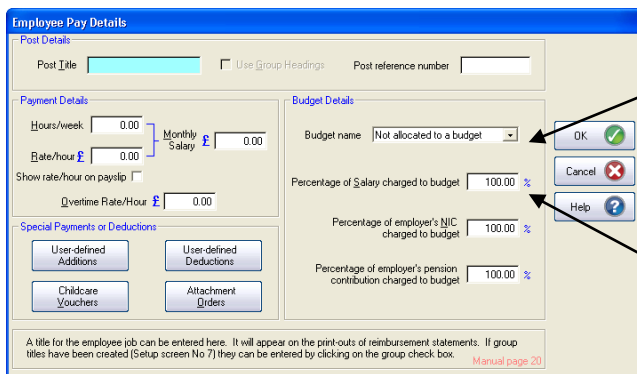
The amount of each budget is set by clicking the Set Budget button. This displays the second screen to enter the annual budget or individual monthly budgets. There is a button to divide the annual budget into 12 equal monthly amounts.

You can return to the second screen to adjust the annual or monthly budget amounts at any time in the year. The new settings will appear in all new budget summaries.

## Allocating employees to a budget

It is possible to allocate the expenses of each member of staff to one of the budgets which are defined in the Setup/Options tab **5 - Staff Budgets**. Staff with multiple posts (employment category 2) can have individual posts allocated to the same or different budgets.

Choose the budget for an individual employee from the drop-down menu on their Pay Details screen (see the section **Entering salary details**).



Drop-down menu to select a budget.

Percentages should normally be 100%.

Employees with multiple posts have a button associated with each post. This button produces a screen to choose the budget for each post (see the section Staff paid for more than one post).

There are fields to define the percentage of salary, employer's pension and employer's NI that is set against the budget. These values should be set at 100% for almost all situations. The fields were originally available when only certain percentages were reimbursed by PCTs, but now the full 100% of these costs is borne by the doctors and hence the full 100% should be set against a budget.

There is a **Not allocated to a budget** option. This should be avoided because the employee's costs will not be included in any budget calculations. Try to find a way of allocating all employee costs to one of the ten budgets.

**Important note:** Try to avoid changing the budget setting for an employee during the year. The budget associated with an employee is recorded in IRIS GP Payroll when a monthly payroll calculation is carried out. Subsequent analysis will normally show that employee's costs set against that budget that month. Changing the budget setting mid-year will still show the earlier months' costs against the original budget. There is an option to change the budget calculations to be done "as if" the employee had the current setting in all months (see below).



## Budget summaries

Budget summaries are printed using the Main Option screen **Print Output/ Export Data** button. Click the **Budgets** tab then select the **Budget** and the **Type of Budget Summary**. The first type of budget summary shows the staff costs against budget for each month in the year. There is a comparison with budget each month and a cumulative figure. The second budget summary can be used to see how individual employee costs affected the overall costs for periods of a month, a quarter or a year.

Clicking the Main Option screen **View Output** button then selecting the **Budget Summary** tab will display a budget summary on the screen. This shows the first type of budget summary - the staff costs against budget each month with a cumulative figure. This can be printed directly from the View Output screen Both the **Print** screen and the **View** screen give you the ability to change the method of calculation to produce results "as if" the employee budget settings had been the current settings throughout the year, rather than the settings which were in place when a particular month's calculations were made. This option can be useful if it is necessary to change an employee budget setting mid year. It can also be used to assess the effect of moving one or more employees into another budget.

There is a facility in IRIS GP Payroll to allow budget settings which have been recorded in earlier months to be changed. From the Main Option screen, click **Correct Errors** then click **To change employee budget settings**. This will open a screen that allows you to change the budget setting for an employee. Choose the employee and the month then change the budget setting.

## Staff reimbursement summaries

When the New Contract was introduced in April 2004 it was thought that the reimbursement summaries would no longer be required. Many practices have intimated that they continue to find these summaries useful and therefore they have been retained for a further year.

From the Main Option screen, click the **Print Output/ Export Data** button and select the **Reimbursement Summaries** tab.

It is possible to print the summaries in a variety of formats. These formats were designed to help practices claim reimbursement prior to April 2004. All of the formats are still available. Many practices continue to use the reimbursement summaries for registrars and salaried doctors because they may have to submit details of expenditure on these employees. A separate page is produced with the details of each doctor.

## Electronic links to HMRC

### Introduction

Over the last few years, HMRC have phased in electronic filing of year-end returns and it is now compulsory for all employers (there are extremely few exceptions, contact HMRC for more information if you think this applies to your practice).

If your practice has not yet registered for HMRC electronic facilities, you can find more details about registration on the HELP screen associated with the **3 - Practice PAYE Details** tab of the Setup/Options screen. Registration is carried out on the HMRC website **www.hmrc.gov.uk**

HMRC continue to increase the information which can be passed from the practice to HMRC electronically. It can also accept the electronic transmission of a P46. It will accept the transmission of a P45 (part 3) when an employee joins the practice and of a P45 (part 1) when an employee leaves the practice. IRIS GP Payroll can send these P45/P46 transmissions. The details and method of transmission are described in this chapter.

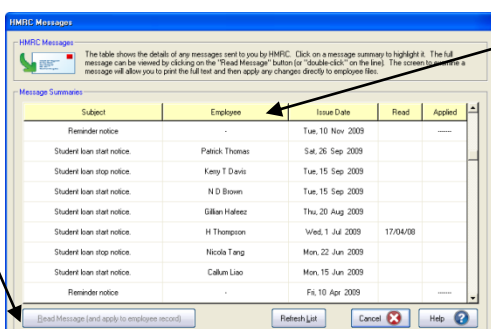
This chapter describes the various electronic links that now exist between IRIS GP Payroll and HMRC:

- HMRC messaging service (DPS)
- eFiling end-of-year P14s and P35
- Transmitting a P46 for a new employee
- Transmitting part 1 and part 3 of a P45

### HMRC messaging service

HMRC sends data messages directly to the practice. IRIS GP Payroll can pick up these data messages, present them on screen in a form which resembles an email, allow these messages to be printed and the data applied directly to employee files.

Clicking the **HMRC Messages** button will cause IRIS GP Payroll to link to HMRC and pick up any new messages. A table shows a summary of all messages. Clicking a column heading will rearrange the order of the messages.



Re-arrange order

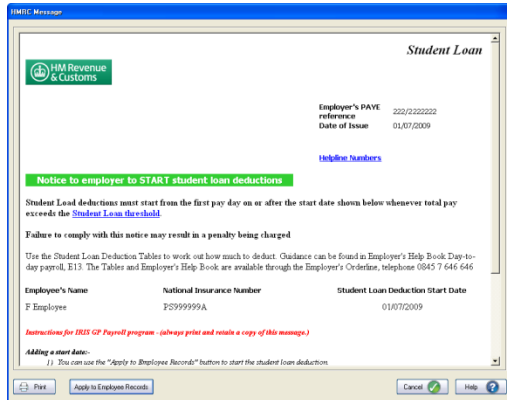
Examine/read a message

Subject	Employee	Issue Date	Read	Applied
Reminder notice		Tue, 10 Nov 2009		
Student loan start notice	Patrick Thomas	Sat, 26 Sep 2009		
Student loan stop notice	Kerry T Davis	Tue, 15 Sep 2009		
Student loan start notice	N D Brown	Tue, 15 Sep 2009		
Student loan start notice	Gillian Haleez	Thu, 20 Aug 2009		
Student loan start notice	H Thompson	Wed, 1 Jul 2009	17/04/09	
Student loan stop notice	Nicola Tang	Mon, 22 Jun 2009		
Student loan start notice	Calum Liao	Mon, 15 Jun 2009		
Reminder notice		Fri, 10 Apr 2009		

[Read Message (and apply to employee record)] [Refresh List] [Cancel] [Help]

The table will show when messages were issued by HMRC, the date the message was first read, and where applicable the date when the data was transferred to the employee file. Each message in the message service will only have information about one employee (in the old email service, an email could have information about a number of employees).

To examine an individual message click the line of the message to highlight it and click the **Examine Message** button (alternatively double-click the line of the message).



This will open a screen showing the full text of the message as it would appear on the HMRC website. The amount of information displayed on the screen will depend on the screen resolution. The higher the screen resolution the more of the message can be seen. On computers with low screen resolution the scroll bars must be used to read the entire message.

**Messages should be printed using the Print button** - You should keep a printed copy of all HMRC messages for at least three years. Old messages are not deleted from the HMRC system and the full list of messages can be recovered at any time (see below) but it is good practice to print and retain a paper copy of each message.

Messages should be examined, printed and then when appropriate the **Apply to Employee Records** button can be used to transfer any changes directly to the employee files. This means that any new tax code will be applied automatically; you do not have to change it manually.

### Direct transfer of data to employee files

The **Apply to Employee Records** button will apply data when appropriate to employee files but several checks are carried out:

- IRIS GP Payroll searches for an employee with an identical National Insurance number. An error screen will appear if no employee can be found
- IRIS GP Payroll checks that the dates are consistent. Thus a P9 instructing you to change tax codes in the new tax year will not apply these changes if the message arrives in the old tax year
- IRIS GP Payroll will apply changes in a P9, a P6 and a P6B. These messages concern employee tax code changes and will occasionally change the details of previous employment pay and tax. Data from SL1 and SL2 messages (to start and stop student loan repayments) will also be applied directly to employee files

If IRIS GP Payroll cannot apply the data to an employee file it will display an error screen with a reason for the failure. You must then decide if the data should be applied to the employee file using the **Change Employee Details** button.

**Note:**

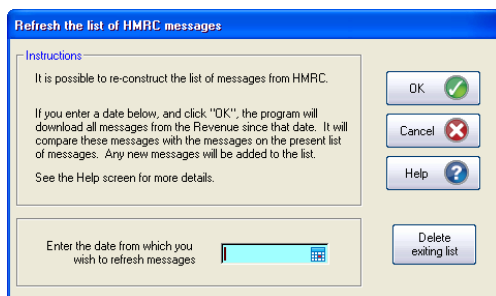
- The practice must have registered with HMRC for eFiling, and have the correct password and User ID entered into the Setup/Options tab **3 – Practice PAYE Details**
- Computers using **Microsoft Windows 95 or early versions of Microsoft Windows NT** (before service pack 6) will not be able to link to the HMRC message service (nor will they be able to send end-of-year returns electronically)

### Recovering the list of messages

IRIS GP Payroll holds a copy of all messages from HMRC and only downloads new messages when the **HMRC Messages** button is pressed. In certain circumstances the payroll software may lose its list of old messages or the list may become corrupt or inaccurate.

The list will be lost if IRIS GP Payroll has to be loaded onto a new computer and the payroll data is restored from a floppy disc. (The file containing the messages is not backed-up onto the floppy because it is too large and therefore when a payroll is reconstructed from a floppy backup the list of old messages will have disappeared.) It is possible to establish a new list of messages.

Click the **Refresh List** button on the **HMRC Messages** screen (i.e. the screen with the table of message summaries – see the section **HMRC messaging service**). This will display a screen:



Enter a date and click the **OK** button. When IRIS GP Payroll links to HMRC it downloads all messages issued from the selected date (rather than downloading only messages issued since the last visit).

The list of messages in IRIS GP Payroll is upgraded, ensuring that the list of messages in the software is identical to HMRC's list.

This screen also has a **Delete** button which can be used to delete the current list of messages in IRIS GP Payroll before reloading with messages from a certain date. This can be useful if the list in the software is becoming too long, all that may be required is a list of messages from the beginning of the current tax year.

**Notes:**

When the list is refreshed from HMRC there will be no information attached to message entries about when the message was read or applied to employee records.

The fact that messages can always be recovered from HMRC should not stop you printing a copy of each message and storing these copies for three years.

If you create a backup on a CD each month this will contain the file of old messages. If you restore from a CD backup the list of HMRC messages will also be restored to the point when the backup was taken. The **Refresh the list of HMRC messages** screen can be used to pick up messages issued since the date of the backup.

## Contract alerts

### Introduction

The new GP contract was introduced in April 2004. The introduction of Quality Indicators and the annual inspection by the local PCO brings pressure on managers to ensure that the evidence exists to justify a claim for quality payments. The clinical IT systems will produce the information for the quality indicators in the clinical domain of the quality framework. The contract also requires managers to regularly assess non-clinical topics such as staff education, training and appraisal, staff hepatitis status, the practice processes for instrument sterilisation, equipment calibration and maintenance, medicines management and many other areas. Most of the indicators in the Organisational Domain and the Additional Services Domain of the quality framework will have to be achieved without help from the practice's clinical software.

IRIS GP Payroll offers practice managers a tool which will help them cope with the demands of the new contract. The **Contract Alerts** tool is designed to alert or remind practice managers of tasks which have to be tackled and completed at certain times in the year. Contract Alerts are reminders which can be defined by the practice manager. A list of alerts which have an active date set for that month will be displayed when IRIS GP Payroll is entered. The alerts can apply to tasks concerning the whole practice or can be refined to apply to one member of the practice staff. Each alert can have a text definition, a date when the alert is due to be reconsidered and a date when the alert was last addressed. IRIS GP Payroll can produce a variety of printed summaries of contract alerts.

#### There are two kinds of contract alerts:

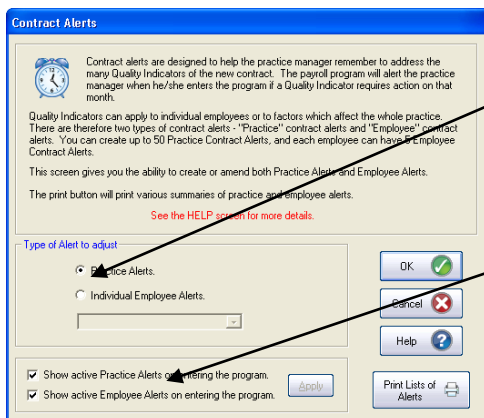
- **Practice contract alerts** - These alerts are designed to apply to the whole practice. IRIS GP Payroll allows 50 practice alerts to be defined by the practice manager. Each alert has a text section (up to 100 characters) and two dates. One date can hold a record of when the task was last addressed. The second date will trigger an alert when IRIS GP Payroll is entered during the month of this second date
- **Employee contract alerts** - These alerts are designed to be added to individual employee files. Five employee alerts can be attached to each employee's file. Each alert entry in an employee file can have two dates, one to record when the task was last addressed and one to trigger an alert message when IRIS GP Payroll is entered during the month of this second date

The Personal Profiles section of an employee file holds details of hepatitis immunisation and status. A date can be entered for the reassessment of the hepatitis status and this date will operate a separate employee alert. The sections on employee appraisals and CPR training also have a reassessment date which will trigger an alert.

## Managing contract alerts

The **Contract Alert** button of the Main Option screen is the main route to both the list of practice alerts and the individual employee alerts. This button will allow you to examine the alert definitions, to change details of any of the alerts and to print various lists of the alerts. An alert is active when the date of the alert lies in the month of the present payroll calculation. When you enter IRIS GP Payroll these active alerts will be displayed, and the important details can be amended by right-clicking the alert. Employee alerts can also be examined and adjusted in the Profile section of the employee's file.

From the Main Option screen, click the **Alerts** button. The **Contract Alerts** screen is displayed:



**Contract Alerts**

Contract alerts are designed to help the practice manager remember to address the many Quality Indicators of the new contract. The payroll program will alert the practice manager when he/she enters the program if a Quality Indicator requires action on that month.

Quality Indicators can apply to individual employees or to factors which affect the whole practice. There are therefore two types of contract alerts - "Practice" contract alerts and "Employee" contract alerts. You can create up to 50 Practice Contract Alerts, and each employee can have 5 Employee Contract Alerts.

This screen gives you the ability to create or amend both Practice Alerts and Employee Alerts.

The print button will print various summaries of practice and employee alerts.  
See the HELP screen for more details.

Type of Alert to adjust:

☒ Practice Alerts.

☐ Individual Employee Alerts.

☒ Show active Practice Alerts on entering the program.

☒ Show active Employee Alerts on entering the program.

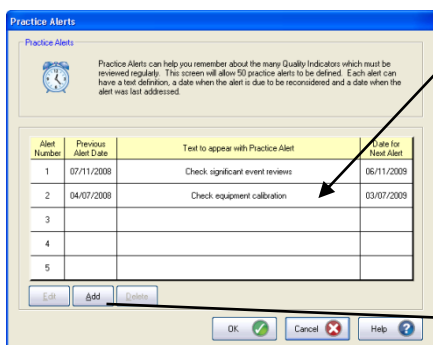
Buttons: OK, Cancel, Help, Apply, Print Lists of Alerts.

Select to examine or change the list of practice alerts or individual employee alerts.

These options allow you to control whether the screens of active alerts appear when you enter IRIS GP Payroll.

## Practice contract alerts

To examine the list of practice alerts select **Practice Alerts** and click the **OK** button – this will display a screen allowing you to define or change the selected alert:



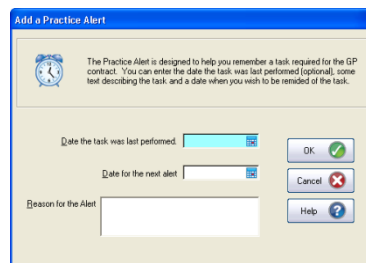
**Practice Alerts**

Practice Alerts can help you remember about the many Quality Indicators which must be reviewed regularly. This screen will allow 50 practice alerts to be defined. Each alert can have a text definition, a date when the alert is due to be reconsidered and a date when the alert was last addressed.

Alert Number	Previous Alert Date	Text to appear with Practice Alert	Date for Next Alert
1	07/11/2008	Check significant event reviews	06/11/2009
2	04/07/2008	Check equipment calibration	03/07/2009
3			
4			
5			

Buttons: Edit, Add, Delete, OK, Cancel, Help.

Right-click to see a menu to edit or delete practice alert definitions



**Add a Practice Alert**

The Practice Alert is designed to help you remember a task required for the GP contract. You can enter the date the task was last performed (optional), some text describing the task and a date when you wish to be reminded of the task.

Date the task was last performed:

Date for the next alert:

Reason for the Alert:

Buttons: OK, Cancel, Help.

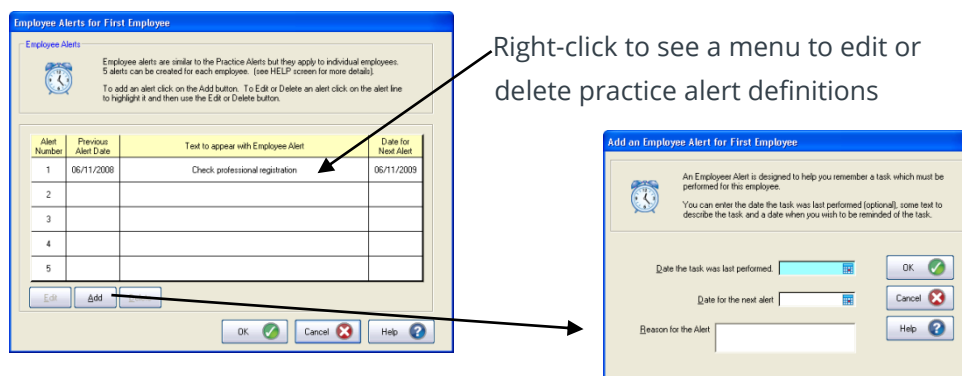
New practice alerts are created by clicking the **Add** button. This will produce a screen to accept the two dates and the text of an alert definition. The text field can have up to 100 characters. The first date is optional - it will hold a date that the task was last undertaken. The second (or alert date) is the date that will trigger a warning screen on entry into IRIS GP Payroll in the relevant month. If no date is entered into the second date field the alert will be defined but will be inactive, because no warning screen will ever be triggered.

To edit or delete an existing definition, click the line of the alert to highlight it and click the **Edit** or **Delete** button. The right-mouse button can be clicked over the line of an alert to give access to the edit or delete functions.

The text of a practice alert should describe a task which the practice manager must supervise regularly to comply with the new GP contract. The tasks should apply to the operation of the whole practice - tasks relating to individual employees should be entered as employee alerts.

## Employee contract alerts

To examine or change an employee alert, click the **Alerts** button from the Main Option screen, then select **Individual Employee Alerts** and choose the employee from the drop-down list. Clicking **OK** will display this screen:



New employee alerts are created by clicking the **Add** button. This will display a screen which allows you to enter the two dates and the text of an alert definition. The text field for employee alerts is restricted to 50 characters. The first date is optional - it will hold a date when that task was last undertaken. The second (or alert date) is the date that will trigger a warning screen on entry into IRIS GP Payroll in the relevant month. If no date is entered into the second date field the alert will be defined but will be inactive, because no warning screen will ever be triggered.

To edit or delete an existing definition, click the line of the alert to highlight it and then click the **Edit** or **Delete** button. The right-mouse button can be clicked over the line of an alert to give access to the edit or delete functions.

The text of an employee alert should describe a task which the practice manager must supervise regularly to comply with the new GP contract. Increment dates can be transferred to an employee alert entry but you must remember that alert screens will only appear on entering IRIS GP Payroll with the practice manager password. If the payroll operator has a separate password the



increment dates should be left in the original field in the employee's main details screen.

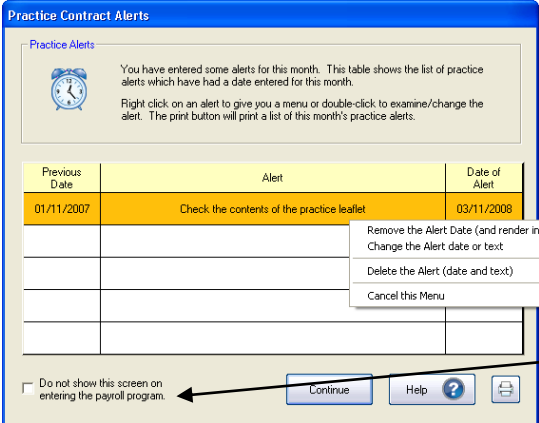
## Printing contract alerts

To print a summary of Practice and Employee alerts go to the **Contract Alerts** screen and click **Print List of Alerts** (see the section

Managing contract alerts).

## Active alerts screens when entering IRIS GP Payroll

Practice alerts and employee alerts become active when the alert date is in the current month. When you enter IRIS GP Payroll using the Practice Manager password you are informed of any active alerts. Active practice alerts are presented first:



Right-click to see a menu to edit or delete practice alert definitions

Use this check box to stop the alert screen appearing.

You can print a list of active alerts and can then adjust the alerts. The right mouse button produces a small menu which allows you to change the text and/or dates of the alert or completely delete the alert.

There is a check box which can be used to stop this alert screen appearing on entering IRIS GP Payroll. You may prefer to use the Contract Alerts button of the main menu screen to print lists of active alerts.

## Active employee alerts

If any employee alerts are active when IRIS GP Payroll is entered they will be displayed on a screen which is similar to the above.

The list of active alerts can be printed with the print (printer icon) button.

Employee alerts can be adjusted on this screen using the right-mouse button. The details can also be adjusted in the employee **Profiles** section, or using the **Alerts** button of the Main Option screen.

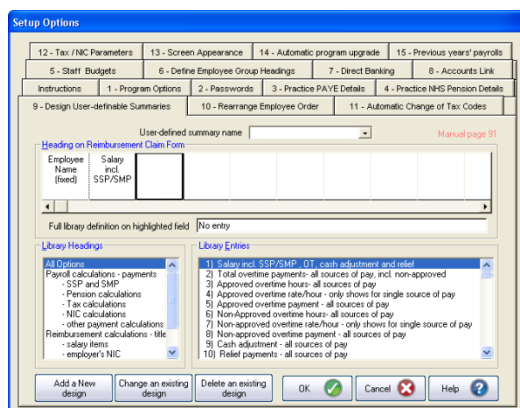
Each employee can be allocated up to five employee alerts. However the employee hepatitis status screen, the appraisal screen and the CPR training screen in the profiles section will accept a date which acts like an alert. The dates associated with hepatitis status, the next appraisal and the next CPR training can be adjusted using the right mouse button menu, but if you want to change any other details this has to be done in the employee profile section.

## User-defined summaries and transfers to Microsoft Excel

### User-defined summaries

User-defined summaries were added to help practices who find that the standard summary layouts are inadequate for their needs. The facility was designed originally for reimbursement claims but many practices continue to find the print-outs useful. You can construct up to six separate summary designs and then use any or all of these designs each month or quarter. The same technique is used to design the layout of payroll data to be transferred to spreadsheets.

To create or edit a user-defined summary, from the Main Option screen click the **Setup/Options** button then choose the tab **9 – Design User-definable Summaries**.



Click the **Add a new design** button.  
Enter a name for the design.

The summary will consist of a table with up to 16 columns. The first column will always contain the names of the employees. The contents of the other columns will depend on the headings chosen from the **Library Headings** section. Different headings will produce columns of different widths. The maximum number of columns can be 16 but this maximum will depend on the column widths actually chosen in order to ensure that the full table fits within the width of a printed page.

The **Library Headings** section has two main subdivisions - the first contains all of the payroll calculations which appear on an employee payslip or on a monthly summary of payroll calculations. The second main subdivision contains all the calculations which could appear on a reimbursement summary (or budget summary). Selecting an option in the **Library Headings** section will display the available data for that heading in the **Library Entries** box to the right.

To add a column to your report, drag a library entry from the **Library Entries** (right-hand) box to the desired box in the summary heading (or highlight a box, and then double-click a library entry). The library contains 119 possible headings grouped by similar entries. The appendix contains a list of the library entries with a brief description of the figures that will be shown in that column.

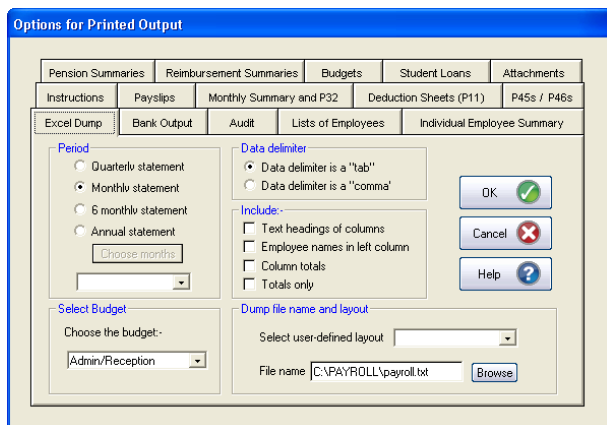
Continue to add columns until the design is complete. Any unused column headings to the right of the table will not appear on the printed summary. The library contains an entry which will allow a blank column to be included in the design (e.g. for comments). A column heading can be removed by highlighting it and pressing the **DELETE** key on your keyboard. Click the **OK** button to store this layout when the design is complete.

## Printing a user-defined reimbursement summary

When a user-defined layout has been created you can print the result as if it were a reimbursement summary. Click **Print Output/ Export Data** from the Main Option screen and select the **Reimbursement Summaries** tab. Choose the period of the summary and the budget in the usual way. In the **Type of Summary** section, choose **User-defined summary** and select the layout from the drop-down list. You can also choose to produce the summary for all employees or for a single employee. Clicking **OK** will print the summary.

## Transferring data to a spreadsheet (Excel dump)

The **Excel Dump** option will transfer payroll data to an intermediate disc file which can then be read by Microsoft Excel or other common spreadsheet software.



You must first design the layout of the data that is to be transferred to the spreadsheet. This is done using the **User-defined layouts** that are described in this chapter. The **layout** must be given a name. Up to 16 column headings can be chosen from the library of calculations that are available (see Appendix). A number of separate **layouts** can be constructed if different data is to be transferred to the spreadsheet.

To transfer the data to a file for transfer to a Microsoft Excel-like spreadsheet, click the **'Print Output/ Export Data'** button on the **Main Option** screen and select the **'Excel Dump'** tab.

Select the layout of the data to be transferred to the spreadsheet using drop-down list in the **Dump file name and layout** section (lower panel).

Data will be transferred to an intermediate file you can specify the file name using the second field of the **Dump file name and layout** section. The default file will be the **payroll.txt** file in the \Payroll subdirectory of the C: drive. You can use the **Browse** button to select or create a different file. You should always include the .TXT extension to ensure it can be loaded by a spreadsheet. If a new file is designated as the intermediate file this file will become the default entry in this field.

The **period** selection is similar to the selection for reimbursement summaries. Data can be transferred for single months, for quarters, half-years, annual periods or for irregular groups of months.

The **data delimiter** is the character that will separates data in the intermediate file. Most spreadsheets will accept data separated by a comma or a tab character. The default setting is a tab character because this is the default delimiter when transferring to Microsoft Excel.

The data will be transferred as a grid with columns defined by the **User-defined layout**. The check boxes in the **Include** section allow certain other items to be transferred. The headings for each column, as defined in the Appendix, can be added. The employee names can be included in the left-hand column. Column totals (where a total is relevant) can be transferred as the bottom line of the grid, or the transfer can be restricted to the column totals only.

## Loading the intermediate file to Microsoft Excel

There are various methods to transfer data into a Microsoft Excel spreadsheet. The simplest method is to open the file in a separate workbook and then copy and paste the relevant data to the desired position in the target workbook. Other methods using macros or Visual Basic for Applications may be used by experienced spreadsheet users. The method described here applies to Microsoft Excel 2000/XP but the same techniques apply to other versions of Microsoft Excel and other spreadsheets.

## Steps in the transfer:

1. Open Microsoft Excel. Click **File** then **Open**.
2. Select the intermediate file using the normal Windows method to select a file.
3. Microsoft Excel will enter a **Text Input Wizard** which requests certain information. Most of the selections can be accepted as the default settings.
4. The second screen requires the delimiter character which separates data in the intermediate file. Check that the setting is the same as you set in IRIS GP Payroll (e.g. a tab character or a comma).
5. The options in the third screen of the wizard can be accepted as the default values.
6. On clicking **Finish** the payroll data will be placed in the upper left-hand corner of the spreadsheet. If employee names or column headings have been transferred then column widths will have to be increased to see the data grid clearly.
7. Highlight the data that is to be transferred to the target spreadsheet by dragging the mouse over the data.
8. Click **Edit** then **Copy**. The data has then been copied to the clipboard.
9. Open the target spreadsheet and paste the payroll data into the required position.

## The Holiday Scheduler

### Introduction

The Holiday Scheduler was originally introduced to monitor employee holidays in full days or half-days. Following requests from some practices the Scheduler has been improved to allow the employee work pattern to be entered in hours and the corresponding holiday counts can now be made in hours.

Each member of staff can be allocated a total number of annual holidays which are counted in full days, half days or hours. Individual holiday periods are recorded on the Scheduler and at any point you can print or view an accurate summary of the employee's remaining holiday allocation.

Public holidays can be declared and these will not be counted when an employee's holiday crosses a public holiday. The Scheduler has a separate section for holidays planned for the next holiday year and these details will be transferred automatically to the current year at the end of this year's holiday period.

The main purpose of the Scheduler is to monitor employee holidays but it also has separate sections to monitor training days, and two other categories which can be defined by the practice. The Scheduler is NOT intended to monitor SSP days or periods of SMP which will be dealt with in the usual way by IRIS GP Payroll.

The Scheduler will automatically use the full area available on the screen. Practices with high resolution screens (SVGA and higher) will see more of the calendar than those with the basic VGA screens. An employee is selected by clicking the name to highlight it. The height of each employee's row can be adjusted using the four option buttons on the right edge of the Scheduler. The three buttons on the lower scroll bar will adjust the calendar detail.

### Main view and monthly view

The main view of the Scheduler has the calendar across the top of the screen. This view is the more useful when adding holiday periods or examining months with many employee holidays. Different parts of the holiday year are displayed using the horizontal scroll bar.

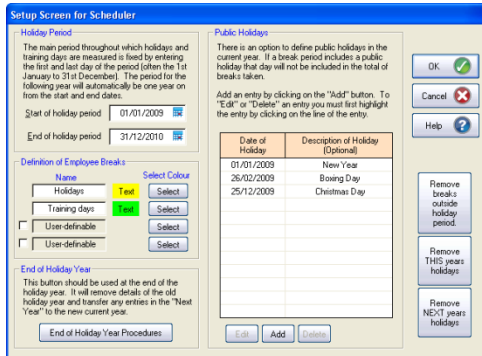
Individual periods of leave can be adjusted by clicking the end of a bar and dragging that end to another position. Clicking with the right mouse button on a period of leave will show the window which defines the dates of the leave. The second view is obtained by clicking the **Monthly** button. This presents the holidays and training days for employees in one month. The month can be changed using the bottom scroll bar. The monthly view will not appear if more than eight employees have holidays in one month because the screen becomes too congested.

To use the Scheduler you should:

- Use the **Practice Set** up button to set the practice holiday period and public holidays
- Use the **Allocate** button to define the employee's annual entitlement
- Add holidays for individual employees using the **Leave** button

## Setting up the Scheduler

Clicking the **Practice Setup** button displays the following screen:



To set the beginning and end dates of the practice holiday period use the **Start of holiday period** and **End of holiday period** boxes.

To change the colour of the Scheduler bars click one of the **Select** buttons and choose the background colour, followed by the text colour. You can also click a check box to use one of the user-definable options and adjust the colour if necessary.

The **End of Holiday Year Procedures** button (bottom left) is used to transfer holidays recorded for next year into the current year. All information about the current year's holidays WILL BE LOST so this should only be used when you are ready to move to the next year.

## Public holidays

Public holidays in the current year can be recorded on the set up screen. If a period of leave straddles a public holiday then that public holiday will not be included in the count of holidays. A public holiday is added by clicking the **Add** button and entries can be edited or deleted by first clicking the entry to highlight it, and then clicking the **Edit** or **Delete** button. The public holidays must be reset when next year's holidays are transferred into the current year.

## Employee holiday entitlement

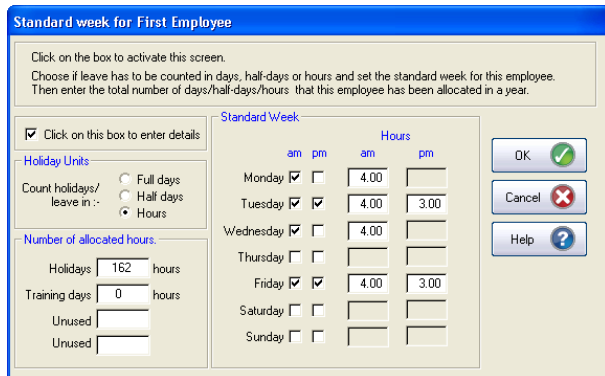
To allocate holidays to an employee, first highlight the employee's name by clicking the name then click the **Allocate** button - this will display a screen for that employee. You must decide how holidays are to be allocated and counted for that individual. Holidays can be allocated as full days, half days or hours. The full day option may be satisfactory for full time staff but the half day option will probably be necessary for part time staff.

A limited facility to count in hours was added in April 2007. The hours worked by an employee, morning and/or afternoon can be declared and IRIS GP Payroll will convert any half day holidays to the equivalent number of hours.

Although the count is done in hours the allocation of holidays continues to be for half or full days - it is not possible to allocate a part of a morning or part of an afternoon as a holiday.



Initially, the majority of the fields are not enabled. To allocate holidays to the employee click the box marked **Click on this box to enter details** – this will enable the rest of the screen. You can now select full days, half days or hours. When counting in hours you must tick the morning and/or afternoon boxes to indicate which days (or half days) are normally worked. This will enable a field allowing you to enter the number of hours worked in that morning/afternoon.



**Standard week for First Employee**

Click on the box to activate this screen.  
Choose if leave has to be counted in days, half-days or hours and set the standard week for this employee.  
Then enter the total number of days/half-days/hours that this employee has been allocated in a year.

☒ Click on this box to enter details

**Holiday Units**

Count holidays/leave in :-  
☐ Full days  
☐ Half days  
☒ Hours

**Number of allocated hours.**

Holidays: 162 hours  
 Training days: 0 hours  
 Unused:   
 Unused:

**Standard Week**

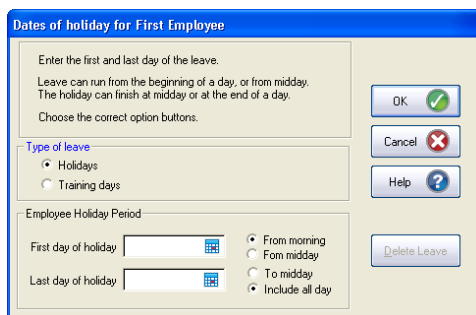
	am	pm	Hours	am	pm
Monday	<input checked="" type="checkbox"/>	<input type="checkbox"/>	4.00		
Tuesday	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4.00		3.00
Wednesday	<input checked="" type="checkbox"/>	<input type="checkbox"/>	4.00		
Thursday	<input type="checkbox"/>	<input type="checkbox"/>			
Friday	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4.00		3.00
Saturday	<input type="checkbox"/>	<input type="checkbox"/>			
Sunday	<input type="checkbox"/>	<input type="checkbox"/>			

OK Cancel Help

Enter the number of holiday units allocated to the employee. This is either the number of days, half days or hours that the employee has available for holidays in the year.

## Entering a holiday for an employee

Highlight the employee and click the **Leave** button. The following screen appears:





**Dates of holiday for First Employee**

Enter the first and last day of the leave.  
Leave can run from the beginning of a day, or from midday.  
The holiday can finish at midday or at the end of a day.  
Choose the correct option buttons.

**Type of leave**

☒ Holidays  
☐ Training days

**Employee Holiday Period**

First day of holiday:    
 Last day of holiday:  

☐ From morning  
☐ From midday  
☐ To midday  
☒ Include all day

OK Cancel Help Delete Leave

Click in the **First day of holiday** box and enter the date. Repeat for last day of the holiday. Both dates are included as holidays. There is an option to start the holiday at midday and finish it at midday for staff who take holidays in half-day units. Clicking the **OK** button will produce a bar on the Scheduler. The bar will cross days that are not worked but IRIS GP Payroll only counts the working days as declared in the employee's details. Public holidays will not be included in the count.

## Changing or deleting a holiday

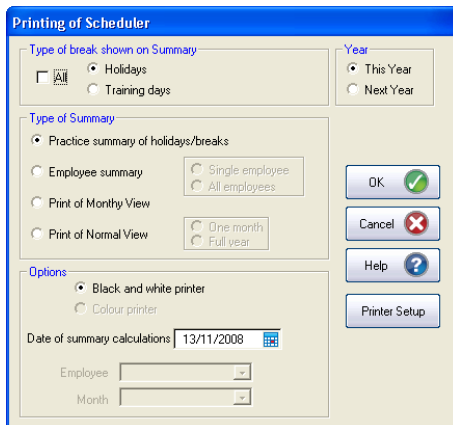
Right-clicking any holiday bar will display the screen used in the last section to establish a holiday. The dates of the holiday can be changed or the **Delete Holiday** button will remove the holiday. Another method is to drag the end of a bar to the new position. Click the left mouse button and drag the end of the bar, then release and the bar will automatically settle at the beginning/middle of a day. If the mouse is positioned in the middle of a bar the whole bar can be moved left or right. To remove a bar, simply drag one end over the other. The left hand button in the lower horizontal scroll bar will magnify the time scale.

## Count employee holidays

Clicking the **Count** button in the main Scheduler screen will display a summary of all employee holidays. The grid will show the employee holiday entitlement, the holidays already allocated, the number yet to be allocated and the number actually taken. Changing the date on the screen will cause the number of holidays taken to be recalculated, based on the new date. There is an option to produce the same counts for training days and any user-defined leave.

## Printing from the Scheduler

To see the print options click the **Print** button in the main Scheduler screen.



In the **Type of Summary** section the first option produces a report showing data for all employee holidays. The second option lists the holidays for an individual employee. This documents the holidays that were taken, and those that are planned.

The third and fourth summaries are printed versions of the two screen views. In each case a month has to be selected. If the practice has a colour printer there is an option to produce the summaries in colour. These views are printed in landscape mode.

## Next year button

Clicking the **Next Year** button in the main Scheduler screen will present a Scheduler for the following holiday year. It has the same functions as the current year Scheduler but has a different background colour. It is intended for holidays which are planned in advance.

## End-of-year

At the end of a holiday year you can move any holidays which were entered in the next year Scheduler into the current year using the **End of Holiday Procedures** button on the Scheduler set up screen (see the section **Setting up the Scheduler**). You will be asked to enter the password as a security check because this action will DELETE all details of the past year's holidays.

## Limitations

Certain limitations have been placed on the Scheduler to ensure that Scheduler and payroll data can still be backed up onto one CD. In the current year Scheduler an employee is limited to 50 separate entries. This includes all holiday periods (each period is one entry), training periods and user-defined periods if these are used. The following year's Scheduler has a limit of 20 entries per employee.

## Installation & Updates



**Important note:** This section describes the steps required to install IRIS GP Payroll on a new PC or to access it from a second PC. If you just need to upgrade an existing installation of the software you should follow the instructions supplied with the upgrade CD.

### Transferring the payroll to a new PC

If you already use IRIS GP Payroll you may sometimes need to transfer it to a different computer, for example if you purchase a new PC. You can do this at any time during the tax year. Follow these instructions to re-install IRIS GP Payroll on a new PC.



**Important note:** Before you begin the installation process, please close all of your other applications.

1. Take a copy of the entire installation folder from your original PC. The installation folder is usually C:\payroll. However, if you have installed in a different location you can find out where by right-clicking on the GP Payroll shortcut on your desktop and selecting **Properties** – the installation location is shown in the **Start** in field.
2. Next you will use the REINSTALL program to install a copy of IRIS GP Payroll on the new machine. Insert the latest IRIS GP Payroll CD into the CD drive of the new machine, click the Windows **'start'** button, select **'Run'** then type **'D:REINSTALL'** (that is the drive letter of your CD drive, in this example D, followed by a colon followed by the word REINSTALL in capital letters). Click **'OK'** and follow the instructions on the screen.

IRIS GP Payroll will tell you when it has finished installing. Please restart the PC before carrying out the next steps.

IRIS GP Payroll has been installed on the new PC as a 'trial' version, which means your practice details and employee information have not been loaded yet. Performing the steps below will upgrade the software to a full working version and load all your data.

3. Restore the copy of the IRIS GP Payroll installation folder (from step 1) on the new computer (usually in C:\payroll). You will be asked if you want to replace the current files. Click **'Yes'**.
4. Log in to IRIS GP Payroll using your original password from your old PC - the software is now a full working copy and contains all the data from your old system, including any previous years' data.

## Installing IRIS GP Payroll on more than one PC

If you already have IRIS GP Payroll running on one PC and you want to be able to access it (non-concurrently) from other PCs, you can install 'client' versions of the software on the other PCs. Follow these instructions to install a client version of IRIS GP Payroll.



**Important note:** Do not use IRIS GP Payroll from two PCs at the same time. IRIS GP Payroll is not a true multi-user system – it is not designed for concurrent access. If you run the software from two PCs concurrently, you may lose changes made on one PC because they are overwritten by the other PC.

The PC that already has IRIS GP Payroll installed is known as the 'payroll server computer'. The PC that you are about to install on is known as the 'client computer'. You must have a network connection between the two PCs which allows the client computer to connect to the payroll server computer.



**Important note:** Before you begin the installation process, please close all of your other applications.

1. You will use the MODULES program to create a link from the client computer to IRIS GP payroll on the payroll server computer. Insert the latest IRIS GP Payroll CD into the CD drive on the client computer. Click the Windows **'start'** button, select **'Run'** then type **D:MODULES** (that is the drive letter of your CD drive, in this example D, followed by a colon followed by the word MODULES in capital letters). Click **'OK'** and follow the instructions on the screen.

The program modules you need have been installed on the client computer, but you still need to create a shortcut on the desktop.



**Important note:** Ensure that the installation folder on the payroll server computer has been shared on the network and the user on the client computer has full read/write/modify permissions. If you require any assistance with this please contact the person responsible for your practice's IT systems.

2. On the client computer, click on the Windows **'start'** button and choose **'My Computer'**.
3. Browse to the location on the payroll server computer where IRIS GP Payroll is installed (this is often the payroll folder on the payroll server computer's C: drive).
4. Right-click on **'Paywin.exe'** (this may show as 'paywin' on some computers) then choose **'Send To'** and then **'Desktop'**.

There is now a new shortcut icon on the client computer's desktop which you can use to log in to IRIS GP Payroll.

## Automatic Update

### Check for Updates - Automatic

When you log into the software, providing it can establish a link to the **IRIS Online for Practice Managers** website, the system will check for any IRIS GP Payroll software updates. If an update is available you will be given the option to download it.

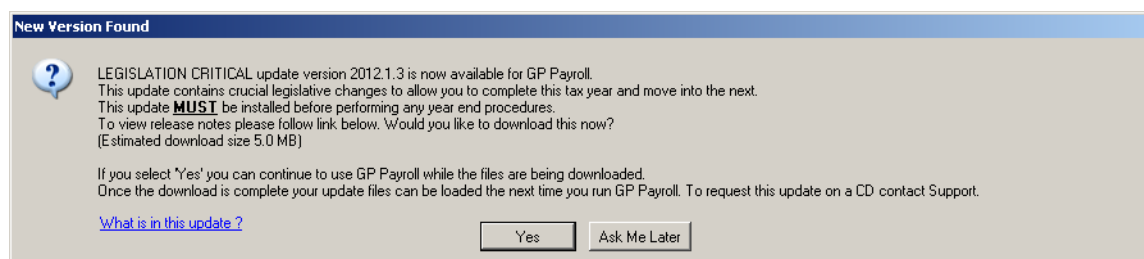
There are three types of update, **Legislation Critical**, **Payroll Critical** and **Non-Critical**. The message displayed depends on the type of update:

#### Legislation Critical Updates

This update contains crucial legislation changes. By clicking **Yes** you are able to download the update now or you can choose to do it at a later date.

This update **MUST** be installed before performing any Year-End procedures.

You are able to view the Release Notes associated with this update by clicking on the **“What’s in this update?”** link.

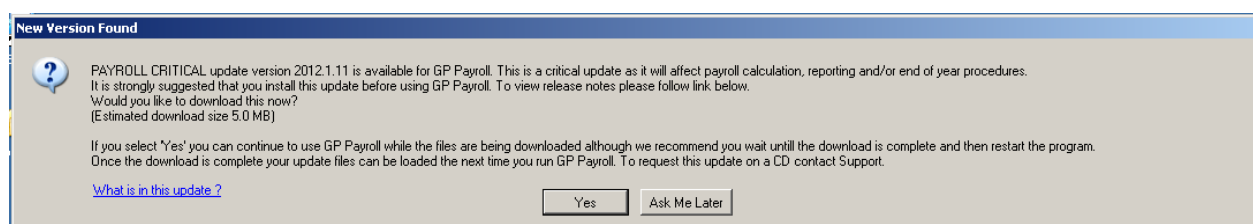


#### Payroll Critical Update

This update is a critical update and it will affect your Payroll calculations/reporting or end of year procedures. By clicking **Yes** you are able to download the update now or you can choose to do it at a later date.

It is advised that you download and install this update before you use GP Payroll.

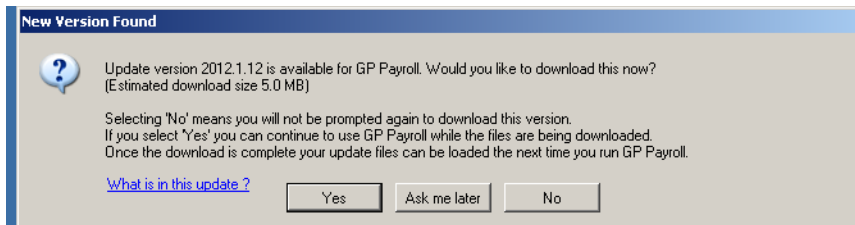
You are able to view the Release Notes associated with this update by clicking on the **“What’s in this update?”** link.



## Non-Critical Updates

Non Critical updates are optional. You are able to download the update now, at a later date or click **No** if you do not want to be reminded of this again.

You are able to view the Release Notes associated with this update by clicking on the **What's in this update?"** link.



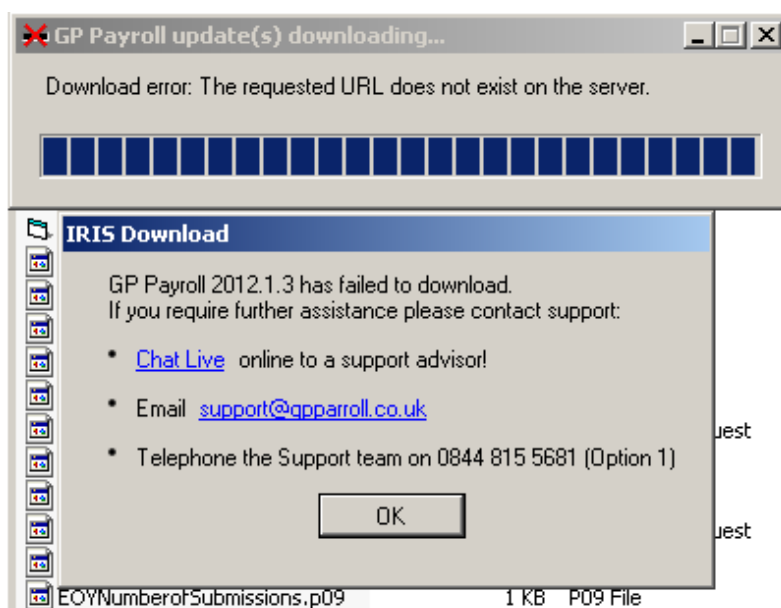
## Check for Updates – Manual

There is also a manual process which allows you to check for and download updates at your convenience. This could be useful if you have selected **No** for a non-critical download and you decide that you do want to download it after all. To check for updates go to **Setup Options** and on tab **14 - Program Update** click **Check for Updates**.

## Downloading Updates

If you select **Yes** to start downloading a new version you can continue to use IRIS GP Payroll while the files are being downloaded.

A progress bar will appear on the screen. If the download stops before completion, for example if your internet connection fails, the next time you log into IRIS GP Payroll it will resume downloading from the point it had reached. If the download is unable to be completed, there are several ways to contact your IRIS Support team.



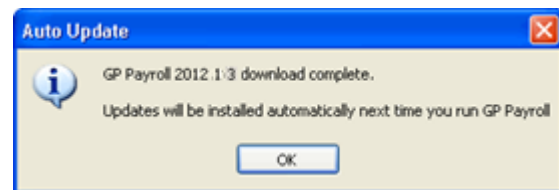
## Pause

There is an option to pause the download, this can be done by right clicking on the download icon on the task bar and selecting **Pause**. The next time you log into IRIS GP Payroll you will receive a prompt to continue with the download.

## Stop

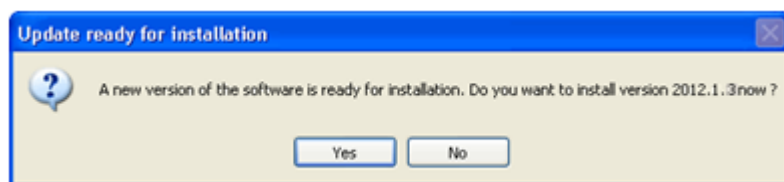
The download can be stopped by right clicking on the download icon on the task bar and selecting **Stop**. This will delete any files already downloaded. The next time you log into IRIS GP Payroll you will be prompted to download the update again.

Once the download is complete you will see a message telling you that you can install the update the next time you run IRIS GP Payroll.



## Install Updates

When you log into IRIS GP Payroll again after downloading an update, you will be prompted to install the downloaded version.



If you choose to install the update the message: 'Updating software, please wait...' will appear. You will then see a message confirming that the update is complete and displaying the version number. Once you click **OK**, the **Log In** screen will appear.

## Frequently Asked Questions (FAQs)

### Installation

#### What should I do if IRIS GP Payroll fails to install or after installation it fails to operate?

This problem suggests that certain modules are not loaded on your computer. You will have to log on to your PC as the Windows Administrator and run IRIS GP Payroll **MODULES.EXE** on the CD. Your computer **will** not load certain Windows modules unless you are logged-on as the Administrator. This small program on the CD will load the required modules. You can also download **MODULES.EXE** from the downloads area on IRIS Online for GP Practice Managers.

#### How can I transfer IRIS GP Payroll to another computer?

You need the latest IRIS GP Payroll CD and a fresh backup of payroll data. See the Installation Instructions section **Re-installing IRIS GP Payroll**

#### How can I link to the payroll from another PC in the practice network?

Read and/or print the Installation Instructions document which is on all payroll CDs. This will explain how to create a link to IRIS GP Payroll from another PC.

#### How can I change the practice name which appears on your payslips?

Fax your request to 0844 815 5665. We will send you an email, or a letter if you prefer, with your new licence details. To enter the new licence details click '**Setup/Options**' and go to tab '**16 - Licence**'.

#### How do I install previous years' payrolls?

This can be done using Setup/Option screen 15. You may be able to access the last four years because they were stored automatically when you upgraded. Data can be reloaded if IRIS GP Payroll indicates it is missing. For details of loading previous years' payrolls please refer to the section



**Restoring previous years' payrolls.**

**What should I do if I cannot see all of the payroll windows because some of them seem too big for my screen?**

IRIS GP Payroll requires the screen resolution to be at least 800 x 600.

**How can I restore the IRIS GP Payroll icon if it has disappeared from the desktop?**

If the icon has been deleted by accident it can be re-created. Right-click a blank area of your desktop. Choose **New** then **Shortcut**. Use the **Browse** button to find IRIS GP Payroll which is PAYWIN.EXE and is usually found in the C:/Payroll folder. Finish the new icon wizard.

## **Working with employee files**

**What should I do if a new employee cannot supply a P45?**

Use the **Cumulative Figures** button (see the section **Entering cumulative/year-to-date figures**) to enter the P45 wizard. This will lead you through a number of questions to set the temporary tax code.

**What should I do if an employee supplies a P45 after payroll runs are calculated?**

Use **Change Employee Details** and **Cumulative Figures** to enter the wizard to change P45 details. The P45 details will be included in the next month's calculations and the tax will be correct.

**How do I calculate NI for an employee who reaches the state pension age in the middle of the month?**

HMRC allow the NI code to be changed to C at the beginning of the birthday month giving the employee the benefit of the new code for the full month.

**What should I do if a former employee returns to work for the practice?**

Do not remove the leaving date of his/her old file. Create a new file for this employee with the same name, NI number etc. as the employee's original file. Enter data from the P45 in the normal way (even if the P45 was the one that you gave the employee when he/she left). There will be two P14s for this employee at the end of the year. Both will automatically be included in the information you send electronically to HMRC.

**I need to make a payment to an employee who has already left and has been given a leaving date and a P45 (e.g. for a backdated pay rise) – what should I do?**

Do not remove the leaving date of his/her original file. Create a new file with same name and NI number. The tax code should be BR and the NI code A. No entry is required for previous pay and tax and no entry is needed in the Pay Details screen. In the next payrun give this employee a Special Salary in the Temporary Adjustment screen of the amount that is owed. After the payrun

add a leaving date to this employee's second file. There will be two P14s for this employee at the end of the year: both will automatically be included in the information you send electronically to HMRC.

### **A payslip is appearing for an employee who has a leaving date – what should I do?**

This means that a payrun calculation was made for this employee before the leaving date was added. Delete the record of the payslip using the first option on the **Correct Errors** screen (obtained by clicking the **Correct Errors** button of the Main Option screen). Choose the employee and the month to delete the payslip. The monthly summary and P32 should be reprinted. They will be constructed without the faulty payslip.

### **Is it necessary to enter an employee's date of birth and/or National Insurance number?**

IRIS GP Payroll will operate without data in the date of birth or the NI number field. However HMRC will insist that at least one of the two fields has data before an end-of-year submission is accepted. You must ensure that you have an NI number or the employee's date of birth before the end of the tax year.

### **What should I do if a registrar or assistant doctor will become a partner mid-year?**

Do not change the employment type in his/her original file to type 7 (doctor/partner). Enter a leaving date and issue a P45. If you want to use the partner facilities (employee type 7) then create a new entry for this doctor.

## **Calculating the payroll**

### **How can I stop IRIS GP Payroll from paying a full month's pay to an employee who has joined the practice in the middle of a month?**

IRIS GP Payroll does not calculate the amount due for a short month using the joining date (employment in general practice is often too irregular for the software to do this calculation). You should manually calculate the amount this employee is due for the short month and enter it as a Special Salary in the Temporary Adjustment screen.

### **An employee is leaving mid-month - how can I produce a payslip and a P45?**

The payroll can be calculated for a single employee. Enter the amount for the short month as a Special Salary in the Temporary Adjustment screen and calculate the payroll. Print a payslip and enter a leaving date. A P45 can be printed (Print Output button) and a pension summary (Print Output - pension summaries) if the employee was in the pension scheme.

### **I have calculated the payroll but I forgot to add some overtime/extra payments for an employee – what can I do?**

Recalculate the payroll but select to do so for a single employee. After the recalculation print a

new payslip, a copy of the monthly summary and a P32 because the payment to HMRC will have changed.

### How are backdated salary increases entered?

The backdated salary increase should be entered as an Extra Payment in the Temporary Adjustment screen (select that tax, NIC and pension are charged). IRIS GP Payroll cannot calculate the backdated amount because staff often have irregular hours and/or are being paid for several posts and not all rates have been increased.

You must calculate the amount due to each employee. For many employees the percentage increase can be applied to the **Gross Pay to Date** figure obtained from the previous month's summary of calculations (second page, first column).

### How can I enter Cash Adjustment or Overtime in the Temporary Adjustment screen for registrars or salaried doctors?

Use the **Special Salary** box to vary the payments to registrars and salaried doctors. The pension contribution may have to be adjusted on the same screen.

## Sickness pay

### The practice has its own sickness scheme (e.g. a number of weeks at full pay, followed by a number at half pay). Is it necessary to process SSP?

Provided that the practice scheme always pays the employee more than he/she would receive from SSP then it is not strictly necessary to process the SSP calculations. However this could mean that the practice may fail to collect some SSP recovery from PAYE. To ensure that any recovery is claimed by IRIS GP Payroll you should record the SSP (in the SSP wizard) and use the next screen to fix the actual payment to the employee.

### How can you check what SSP recovery has been claimed?

The amount of SSP recovered will appear automatically on the P32. To check the figure you have to calculate 13% of the total NI (obtained from the monthly summary sheet). If the payment to SSP in a month is greater than this 13% figure then the difference is recovered from your PAYE payment in the month.

### Does IRIS GP Payroll warn if the employee has had their full period of SSP?

No. You must keep a separate record of any long term period of SSP to determine when the practice's responsibility to pay SSP stops.

## Maternity pay

**The practice has its own maternity scheme (e.g. so many weeks at full pay, so many weeks at half pay etc.). Is it necessary to record the details of the statutory scheme (SMP)?**

Yes. It is very important to enter the separate statutory scheme's details. This will define what the employee would have received if the practice scheme did not exist. The practice receives a generous recovery of SMP from PAYE and IRIS GP Payroll will not claim the recovery if the SMP details have not been entered. Use the SMP wizard. Declare the SMP details and use the next screen to enter the amount that the practice scheme pays in the month.

**How is the amount of SMP due in high weeks calculated?**

The high week figure is 90% of the average weekly salary. The average weekly salary is NOT one quarter of the average monthly salary as you might expect: you must take the average monthly salary, multiply by 12 and divide by 52. The amount for high weeks is 90% of this figure.

## NHS pension

**Why do I receive a warning message when I try to enter the monthly pension figures to the Pension Agency website (England and Wales)?**

This will happen if there are any employees on SSP and/or SMP. This causes the figure for employees' pensionable pay to be less than the employer's pensionable pay and this difference confuses the checks made by the website. The Pension Agency accepts that IRIS GP Payroll figures are correct and the warning can be ignored.

**How can I collect pension contributions which were missed?**

This problem can happen because of a mistake or because an employee has joined the pension scheme and the Pension Agency has advised you that contributions should be backdated; perhaps back to when the employee joined the staff.

Backdated payments for years other than the current tax year cannot be processed through IRIS GP Payroll. The employee should pay any contributions for previous years directly to the Pension Agency and any tax allowance must be negotiated with HMRC. For backdated contributions in the current tax year, calculate the total salary (in previous months) on which pension contributions should have been paid.

Open the **Pensionable Pay** window in the Temporary Adjustment screen. Increase the employee and employer pensionable pay to include the salaries which should have been pensioned. The pension contributions in the current month will then be based on the current month's salary plus the previous months' salaries which require pension contributions.

**An employee has opted to pay for added years. The Agency has instructed me to charge an extra percentage each month, but this is to start on the employee's birthday in the middle of a month. How is this calculation done for the short month?**

Count the number of days from the birthday to the end of the month and calculate this as a fraction of the days in the month (i.e. divide by 30 or 31). Apply this fraction to the percentage to be added for added years and use this figure for the first month. For example, if the percentage for added years is 9% and the employee's birthday is 20 January. The number of days to be paid in January is 12 (i.e. from the 20th to the 31st inclusive). This is 12/31 of a full month. Calculate 12/31 of 9% which equals 3.48%. Enter 3.48% into the **Extra rate for added years** field and calculate the payrun. Change this setting to 9% for February and subsequent months.

**An employee has opted to pay for added years. The Agency has instructed me to backdate the extra contributions to her birthday several months earlier. How can I do this?**

Calculate the salary from the birthday to the present, including the current month's salary. Apply the percentage for extra years to obtain the added years payment due to the end of the current month. Calculate this figure as a percentage of the current month salary and use this figure for the extra percentage this month. For example, the current month's salary is £1000, the added years' percentage is to be 9% and this is to apply to back salary of £1500. The total salary liable to extra contributions at the end of the current month is £2500. The extra contributions would be 9% of £2500 which is £225. £225 as a percentage of the current month's salary is  $225/1000 \times 100$  which is 22.5%. Enter 22.5% into the **Extra rate for added years** field and calculate the payrun. Change this setting to 9% for subsequent months.

## Childcare vouchers

**Can the practice make a charge for administering the voucher scheme?**

No. The national insurance contributions are reduced for both the employee and the practice. The reduction in employer NI is designed to cover the administrative costs.

**Can both parents take advantage of the new childcare voucher scheme?**

Yes. Both parents can be supplied with vouchers and each can receive the tax and NI reduction up to their maximum entitlement.

## HMRC messages

### Why does IRIS GP Payroll not pick up messages from HMRC?

You may be using Microsoft Windows 95 or an early version of Microsoft Windows NT. Neither can link to HMRC's mailbox. Check that you have entered your User ID and password on the Setup/Options tab **3 – Practice PAYE Details**. If IRIS GP Payroll still fails you will have to examine the messages using the HMRC website ([www.hmrc.gov.uk](http://www.hmrc.gov.uk)).

Please inform IRIS GP Payroll Support of the problem.

## Holiday Scheduler

### Why has the holiday year not been changed by the latest upgrade CD?

The holiday is independent of the tax year and it is not reset by upgrade CDs. It is set using the **Practice Setup** button on the Scheduler screen.

### Why does the count of employee holidays seem to include holidays from the previous year?

The button on the Practice Setup screen of the Scheduler to organise the Scheduler at the end of the holiday year has not been used. Correct this by using the **Remove leave outside holiday period** button on the Practice Setup screen of the Scheduler.

## Appendix – Headings for user-defined summaries

### Section 1

No	Text of library entry	Description of action
<b>Payroll calculations (elements of payslips and monthly summaries) - Payments</b>		
1	Salary incl. SSP/SMP, O/T, cash adjust and relief	Gross pay including all additions from all sources incl any SSP & SMP, but excluding any student loan deduction, WFTC or extra payments/deductions
2	Total overtime payments	Overtime payments, approved and non-approved, from all sources of pay
3	Approved overtime hours	Approved overtime hours from all sources of pay
4	Approved overtime rate	Approved overtime rate - only shown for a single source of pay
5	Approved overtime payment	Approved overtime payment, from all sources of pay
6	Non-approved overtime hours	Non-approved overtime hours from all sources of pay
7	Non-approved overtime rate	Non-approved overtime rate - only shown for a single source of pay
8	Non-approved overtime payment	Non-approved overtime payment from all sources
9	Cash adjustment	Cash adjustment from all sources of pay
10	Relief payment	Relief payment from all sources of pay
11	Car allowance	Car allowance - registrars only
12	Car expenses	Car expenses - registrars only
13	Profit on car allowance	Profit on car allowance - registrars only
14	Extra addition payments (totals)	User-defined additional payments
15	Extra deductions (totals)	User-defined deductions
<b>Payroll calculations - SSP and SMP</b>		
16	Number of days to calculate SSP	Number of days to calculate SSP after subtracting the waiting days.
17	Total payment of SSP	Total payment of SSP included in item (1)
18	SSP recovered from PAYE	SSP recovered from PAYE for this employee
19	Total payment from SMP	Total payment from SMP included in item (1)
20	SMP recovered from PAYE	SMP recovered from PAYE - NOT including NIC compensation
<b>Payroll calculations - Pension calculations</b>		
21	Gross pay in month before pension	Gross pay in month before pension deduction
22	Employee contribution	Employee contribution to NHS pension scheme
23	Employee added years contribution	Employee added years contribution (often called the NHS AVC)
24	Employee AVC to Equitable Life	Employee contribution to Equitable Life AVC (or equivalent)
25	Employer's contribution	Employer's contribution to NHS pension scheme
<b>Payroll calculations - Tax calculations</b>		
26	Pay liable to tax	Pay liable to tax in month (after deduction of pension etc.)
27	Tax code	Tax code in the month of calculations
28	Free pay	Free pay in the month of calculations
29	Total taxable pay to date	Total taxable pay to date (after deduction of free pay)
30	Total tax due to date	Total tax due to date (from tax tables)
31	Tax this month	Tax this month
32	Tax not charged this month	Tax not charged this month (K codes only)
<b>Payroll calculations - NIC calculations</b>		
33	Pay liable to NIC	Pay liable to NIC in month (gross pay)
34	NIC code	NIC code in the month of calculations



No	Text of library entry	Description of action
35	Total NIC due	Total NIC due in the month (before subtracting rebates)
36	Total NIC due	Total NIC due in the month (after subtracting both rebates)
37	Employee NIC due	Employee NIC due in the month
38	Employer NIC due	Employer NIC due in the month (before subtracting rebate)
39	Employee NIC rebate	Employee NIC rebate in the month (rebate applies to NIC codes D and E only)
40	Employer NIC rebate	Employer NIC rebate in the month (NIC codes D and E only)
41	Employee plus employer NIC rebate	Employer and Employee NIC rebate (NIC codes D and E only)
42	Employer NIC (after both rebates)	Employer NIC after subtracting both employer and employee rebates
<b>Payroll calculations - other payment calculations</b>		
43	Student loan repayment	Student loan repayment in month (when salary is > £1250.00 in month)
44	Tax credit (WFTC/DPTC)	Working Family Tax Credit (or DPTC) in month
45	SSP NOT recovered from PAYE	SSP not recovered (recovery only occurs when SSP > 13% of total NIC)
46	NIC compensation on SMP	NIC compensation on SMP for small employers
47	SMP and total SSP	SMP payment and total SSP payment
48	Recovered SSP and SMP	Recovered SSP and recovered SMP (not including NIC compensation)
49	Recovered SMP and NIC compens.	Recovered SMP and NIC compensation on SMP
50	Recovered SSP, SMP & NIC comp.	Recovered SSP, and SMP and NIC compensation on SMP
51	Employee pensionable pay	Employee pensionable pay in month
52	Employer pensionable pay	Employer pensionable pay in month
53	Effective pensionable hours	Effective pensionable hours in month (part time employees only)
54	WTE hours in month	Number of hours in the whole-time equivalent post (for pension)
55	Date on payslip	Date on a payslip in a month
56	Total pay to date	Total gross pay to date (including pension contribution)
57	Total pension to date	Total employee NHS pension contribution to date
58	Total SSP to date	Total SSP payments to employee to date
59	Total SMP to date	Total SMP payments to employee to date
60	not used	-
61	Total student loan to date	Total student loan repayments to date
62	Net payment to employee	Net payment to the employee in a month (as on payslip)

## Section 2 - Reimbursement calculations

(All reimbursement figures exclude non-approved overtime)

### Reimbursement calculations - days, hours, rate per hour and titles

63	Number of pay days	Number of pay days in the reimbursement period
64	Number of hours per week	Declared number of hours worked per week
65	Hourly rate	Hourly rate of pay declared in employee main file
66	FHSA/Health Board number	FHSA/Health Board number on the employee main data screen
67	Post title	Post title declared in the employee file (can be a group title)
68	Post reference number	Post reference number declared in employee file
69	Employee pension number	Employee number for the NHS pension scheme (SD or SB number)

### Reimbursement calculations - salary items (non-approved O/T not included)

70	Reimbursable pay incl O/T, cash adjustment and relief	Reimbursable pay including approved overtime, relief pay and cash adjustment, excluding non-approved O/T (single source of pay)
71	Item (70) without relief pay	Reimbursable pay as above but without relief pay (single source of pay)

No	Text of library entry	Description of action
72	Item (70) without overtime pay	Reimbursable pay as above without approved O/T (single source of pay)
73	Item (70) without relief or O/T	Reimbursable pay including cash adjustment (single source of pay)
74	Item (70) without cash adjustment	Reimbursable pay as above without cash adjustment (single source of pay)
75	Item (70) without cash, O/T, relief	Reimbursable basic pay
76	Item (70) without total SSP and SMP	Reimbursable pay as in item (70) without totals SSP & SMP payments
77	Item (70) without recovered SSP, SMP and NIC compensation on NIC	Reimbursable pay as in item (70) without the recovered elements of SSP/SMP and NIC compensation on SMP
78	Relief payment	Relief payment (single source - item (10) shows relief from all sources)
79	Approved overtime payment	Approved OT (single source - item (5) shows OT from all sources)
80	Approved overtime hours	Approved overtime hours (single source - item (3) shows hours from all sources)
81	Cash adjustment	Cash adjustment from single source (item(9 shows all sources)
82	Relief and approved overtime	Relief and approved overtime (single source)
83	Relief and cash adjustment	Relief payment and cash adjustment (single source)
84	Cash adjustment and approved O/T	Cash adjustment and approved O/T (single source)
85	Relief, cash adj. and approved O/T	Relief payment, cash adjustment and approved O/T (single source of pay)
<b>Reimbursement calculations - employer's NIC</b>		
86	Employer's NIC - based on item 70	Employer's NIC - calculations based on salary item 70
87	Employer's NIC - based on item 71	Employer's NIC - calculations based on salary item 71
88	Employer's NIC - based on item 72	Employer's NIC - calculations based on salary item 72
89	Employer's NIC - based on item 73	Employer's NIC - calculations based on salary item 73
90	Employer's NIC - based on item 74	Employer's NIC - calculations based on salary item 74
91	Employer's NIC - based on item 75	Employer's NIC - calculations based on salary item 75
92	Employer's NIC - on relief only	The contribution to employer's NIC due to relief payment
93	Employer's NIC - on O/T only	The contribution to employer's NIC due to approved overtime
94	Employer's NIC - on cash adj. only	The contribution to employer's NIC due to cash adjustment
95	Employer's NIC - on O/T and relief	The contribution to employer's NIC due to overtime and relief payment
96	Employer's NIC - on relief / cash adj	The contribution to employer's NIC due to relief and cash adjustment
97	Employer's NIC - on O/T / cash adj	The contribution to employer's NIC due to overtime and cash adjustment
98	Employer's NIC - O/T, relief, cash adj	The contribution to employer's NIC due to overtime, cash adjustment & relief
99	Employer NIC saving	Employer NIC saving because employee is in NHS pension scheme - normal NIC minus NIC when employee has contracted out NIC code (D or E)
<b>Reimbursement calculations - salary items (non-approved O/T not included)</b>		
100	Percentage salary reimbursement	Percentage salary reimbursement declared for single pay source
101	Salary reimbursement - based on 70	Reimbursement claim on full salary as defined in item 70
102	Item 101 without relief	Reimbursement claim on full salary without relief payment
103	Item 101 without overtime	Reimbursement claim on full salary without overtime payment
104	Item 101 without relief or overtime	Reimbursement claim on full salary without relief or overtime payments
105	Item 101 without cash adjustment	Reimbursement claim on full salary without cash adjustment
106	Item 101 without cash, O/T, relief	Reimbursement claim on full salary without cash adjustment, overtime or relief
<b>Reimbursement calculations - reimbursement of employer's pension contributions</b>		
107	Percentage reimbursement of pension	Percentage reimbursement of employer's contribution to NHS pension (single source of pay)
108	Reimbursement of employer's pension contribution	Reimbursement of employer's NHS pension contribution based on full salary (including non-approved overtime)

No	Text of library entry	Description of action
109	Reimbursement of employer's pension contribution	Reimbursement of employer's NHS pension contribution based on full salary (excluding non-approved overtime)
110	Reimbursement of employer's pension on basic(or special) salary	Reimbursement of employer's NHS pension contribution based on basic (or special) salary without overtime, relief or cash adjustment
111	Reimbursement of employer's - pension on overtime, relief and cash adjustment	Reimbursement of employer's NHS pension contribution based on overtime, relief and cash adjustment payments
112	Reimbursement of employer's pension on overtime and relief	Reimbursement of employer's NHS pension contribution based on overtime and relief payments
113	Reimbursement of employer's pension on cash adjustment	Reimbursement of employer's NHS pension contribution based on cash adjustment payment
114	Reimbursement of employer's share of pre-1979 NHS pension scheme	Reimbursement of employer's contribution to pre-1979 NHS pension scheme
<b>Miscellaneous Entries</b>		
115	Blank column heading	This option will enter a blank column heading and no data in the column
116	Column for signature	This will enter a column with heading 'signature'. The data area will be blank
117	Insert a column for notes	This will enter a column with heading 'notes'. The data area will be blank
118	Insert a column for training expenses	This will enter a heading 'training expenses'. The data area will be blank because the software has no details of training expenses - they must be added manually
119	Increment date	Employer's NIC - calculations based on salary item 74

## Software available from IRIS

### **IRIS GP Payroll**

Simple, accurate and reliable payroll software which handles all requirements of the NHS Pension Scheme

### **IRIS GP Accounts**

Easy to use, flexible accounts software written by GPs and tailored for NHS general practice

### **IRIS HR Manager**

The easy way to keep employee data up-to-date

### **IRIS OpenPayslips**

A secure web based solution that allows your employees to access, and download their e-payslips via an online portal

## Stationery order line

0844 815 5656

## HMRC online service helpdesk

Tel: 0300 200 3600

Fax: 0844 366 7828

Email: [helpdesk@ir-efile.gov.uk](mailto:helpdesk@ir-efile.gov.uk)

## HMRC employer helpline

Tel: 0300 200 3200

## HMRC employer helpline (for new business)

Tel: 0300 200 3211

## Support

Tel: 0844 815 5681

Fax: 0844 815 5665

Email: [support@gppayroll.co.uk](mailto:support@gppayroll.co.uk)